Leganto Tighter Integration for Purchase Requests Focus Group Developed Enhancements

Managing PO Lines: Add Edit in View Mode

- Adding an option to "Edit" the PO line when it's in view mode
- Prevents the need to back out and search for PO Line to Edit after approving the purchase request

Purchase Request Form: Course Info Table

Managing Purchase Requests Created From Citations

March 2020 Fulfillment - Course Reserves

The **Course Information** table has been added to the **Purchase Request** form, displaying basic information about the course.

Course Information

	Code	Section	Name	Processing Department	Academic Department	Number Of Participants	Instructor	Term	
1	ORG651	-	Leadership in public organizations	Business Administration		105	Multiple	-	...

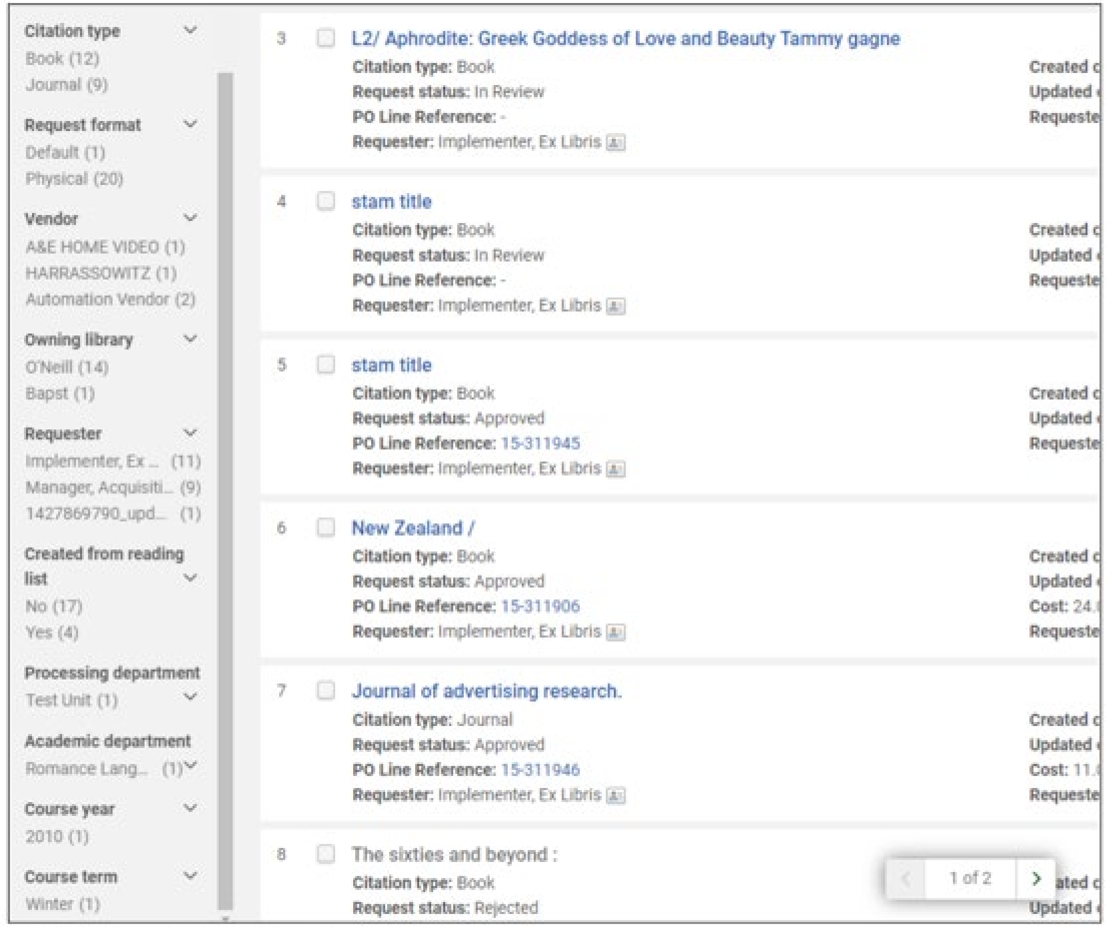
Number of total copies	**5**
Citation Tag	**Essential**
Created automatically by rule	**Citations with Essential Tag - Auto Purchase Req**

Course Information Table

Manage Purchase Requests: Facets

The following facets have been added to the Manage Purchase Requests screen (Acquisitions > Manage Purchase Requests):

- Processing department
- Academic department
- Campus
- Course year
- Course term
- Citation tag

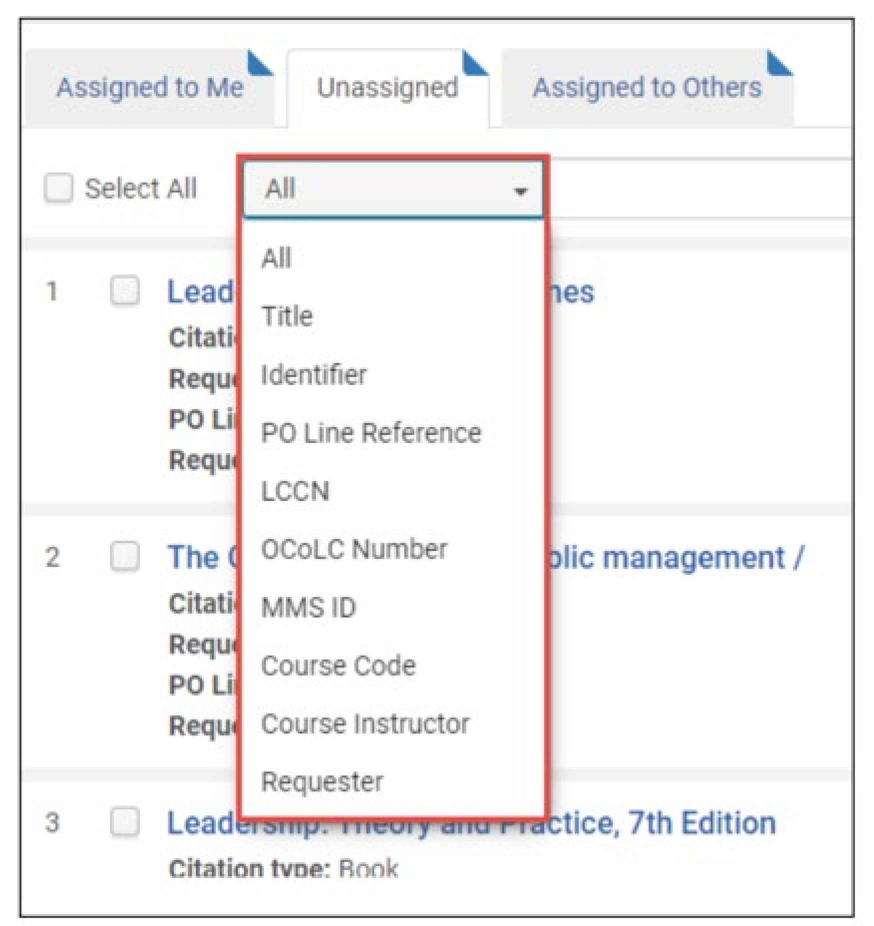


Facets Added to the Manage Purchase Requests Screen

Manage Purchase Requests: Search Criteria

The following search criteria have been added:

- Course Code
- Course Instructor
- Requester



Added Search Criteria

Associate Citation with MMS_ID

- Once BIB is created – associate to citation
- This will ensure availability is displayed on citation once purchasing is complete

Tighter Purchase Integration Focus Group Membership

- Members:
  - **Curtin University:** Linda Sheedy, Gail Valencia
  - **The University of Adelaide:** Julie Wright
  - **The University of Edinburgh:** Alistair Millar, Angela Laurins
  - **The University of Manchester:** Linda Pover
  - **The University of New South Wales:** Alison Neil
  - **The University of Sheffield:** Chris Jones, Emily Bogie, Fran Abbs, Rosa Sadler
  - **The University of St. Thomas:** Tina Witzel, Deb Juarez

Focus Group Process

- Determine membership
- Discussed customer needs during in-person meetings and on Basecamp
- Needs are outlined and solutions are offered by Ex Libris
- Customers give feedback to the solutions provided
- Ex Libris creates development plan for some needs, while others are assigned to undergo a community validation process
- Community validation will be coordinated using Idea Exchange and Leganto-L in the near future