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
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.

<table>
<thead>
<tr>
<th>Code</th>
<th>Section</th>
<th>Name</th>
<th>Processing Department</th>
<th>Academic Department</th>
<th>Number Of Participants</th>
<th>Instructor</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORG651</td>
<td></td>
<td>Leadership in public organizations</td>
<td>Business Administration</td>
<td></td>
<td>105</td>
<td>Multiple</td>
<td></td>
</tr>
</tbody>
</table>

Number of total copies: 5
Citation Tag: Essential
Created automatically by rule: Citations with Essential Tag - Auto Purchase Req
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
Manage Purchase Requests: Search Criteria

The following search criteria have been added:

• Course Code
• Course Instructor
• Requester
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