



SCUOLA
NORMALE
SUPERIORE

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IGeLU 2023

Purchase request in Alma

A suggestion for
service improvement



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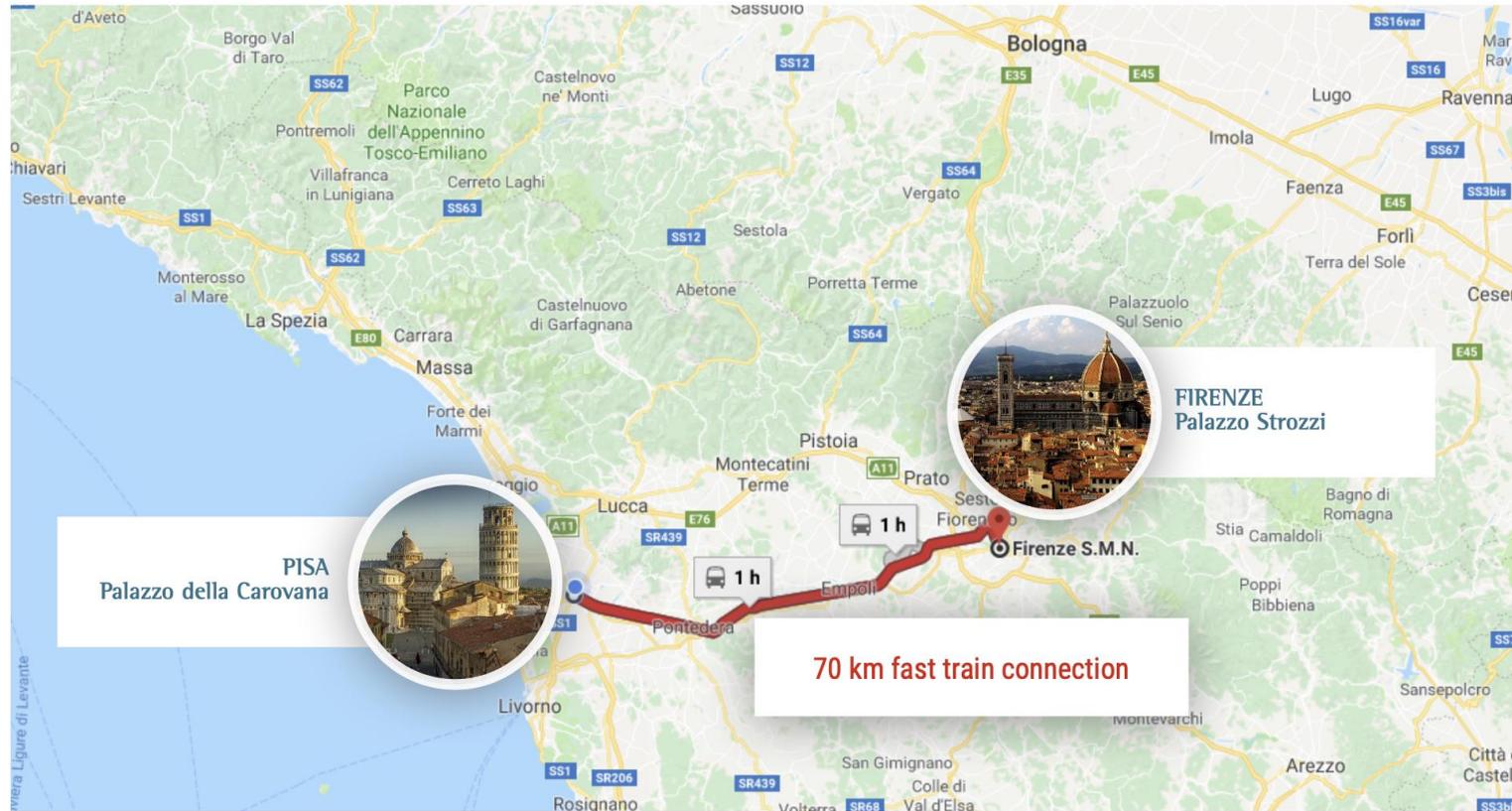
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- Introduction: my Institution and its Library, where I work
- Overview of the Purchase request module
- An alternative scenario
- Missing functions and possible workaround
- Conclusions

Founded by **Napoleon** in **1810** as a twin sister of the École Normale Supérieure in Paris, the **Scuola Normale Superiore** is a university institute of higher education, research and high-level training with a special status.

The Normale promotes culture, teaching and research in the disciplines of the **Humanities**, **mathematics**, and **natural and social sciences**, and the exploration of their interconnections.

Since 1810, the SNS has had around **6000 Alumni: scientists, teachers**, leading **personalities** in the fields of **research, culture**, and in **social and civil life**, managers, politicians, economists, **Nobel prize winners** (Carducci, Fermi, Rubbia), a **Fields Medal** (Alessio Figalli), **Presidents of the Italian Republic** (Gronchi, Ciampi), **Prime Ministers** of Italy (Ciampi, D'Alema).



- Faculty of Humanities | Pisa

Ancient History and Classical Philology; History and Paleography; History of Art and Archeology; Modern Literature and philology, Linguistic; Philosophy

- Faculty of Science | Pisa

Biology, Chemistry and Geology; Mathematics and Information Science; Physics

- Faculty of Political and social sciences | Florence

Political and social sciences



Undergraduate

3 + 2 years



PhD

4 years

The "**Carlo Azeglio Ciampi**" **Institute of Advanced Studies**, in Florence. It carries out research activities featuring interdisciplinary approaches and an international dimension.

teaching and research numbers

10

Undergraduate Courses

- 5 Humanities
- 4 Sciences
- 1 Political and social sciences

13

PhD Courses

- 5 Humanities
- 6 Sciences
- 2 Political and social sciences

6

Laboratories

- 2 Humanities
- 3 Sciences
- + 1 Interfaculty Research Centre

222

Research projects

- 12 UE
- 32 Italian Ministries
- 115 SNS
- 63 Others

Ratio lecturers/students (Undergraduate + PhD): 1/7

Undergraduate students: **302**

PhD students: **340**

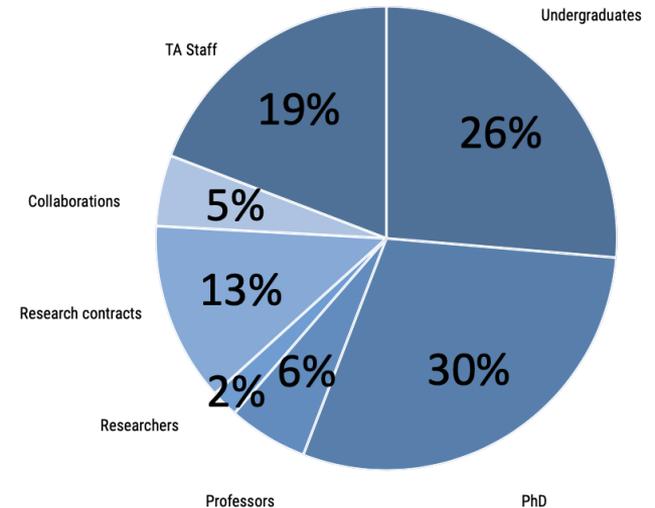
Professors: **64**

Researchers: **22**

Research contracts: **144**

Collaborations: **57**

Technical and Administrative Staff: **221**



the Library collections

- Open shelf system, organized by subject area and topic
- Library size increasing through:
 - ✓ Ongoing acquisitions and exchanges (in particular for journals)
 - ✓ **Donations** and **legacies** which scholars donate to the SNS



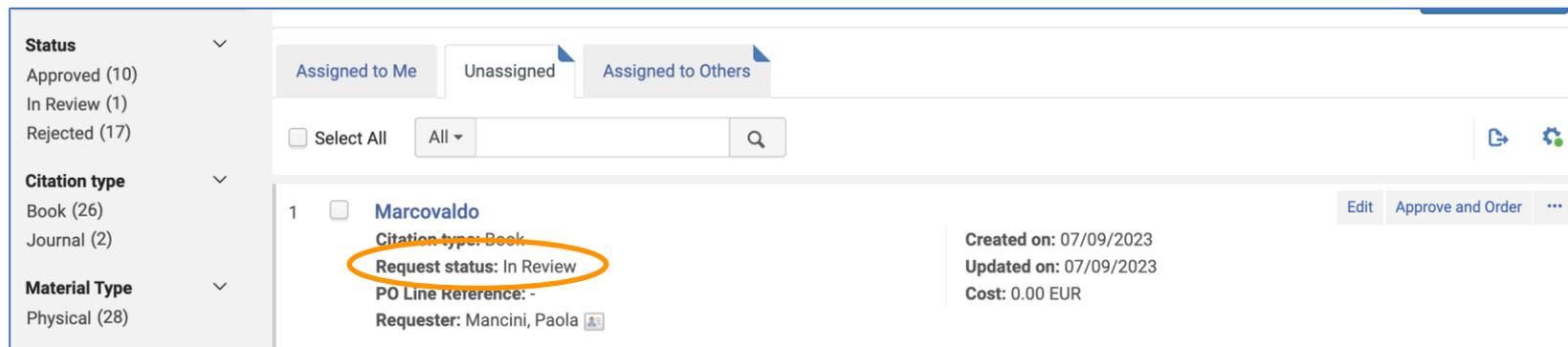
beginning of the 20th century	nearly 10.000
1933	nearly 14.000
2nd half of the 20th century	nearly 120.000 → 500.000
Nowadays	more than 1.000.000

Library details (per year, as 2022)

- Loans 12.600
- Consultations 55.484
- ILL/DD requests 1.960
- Active users 3.025
- Presences 31.162
- Opening days 287
- Average daily attendaces 238
- Yearly opening hours 3.323 (11:57 h/d)
- Shelves > 20,5 km
- Staff 25
- Outsourced 13
- Book heritage + 1.000.000
- Book records + 650.000
- Catalogue searches 908.412
- Downloaded articles 581.857
- Consulted ebooks 238

Alma workflow for purchase requests

- The user sends a purchase request by the form from the discovery tool
- All information entered by the user creates a **new purchase request** in Alma (with *In review* status)
- the *Purchase request operator* role allows the Alma user to display and manage purchase requests that are new or assigned to him/her



The screenshot shows the Alma purchase request interface. On the left, there are filters for Status (Approved (10), In Review (1), Rejected (17)), Citation type (Book (26), Journal (2)), and Material Type (Physical (28)). The main area displays a list of requests. The first request is for 'Marcovaldo' with a status of 'In Review' (circled in orange). The request details include: Citation type: Book, Request status: In Review, PO Line Reference: -, and Requester: Mancini, Paola. The request was created and updated on 07/09/2023, with a cost of 0.00 EUR. Action buttons for 'Edit' and 'Approve and Order' are visible.

Status	Count
Approved	10
In Review	1
Rejected	17

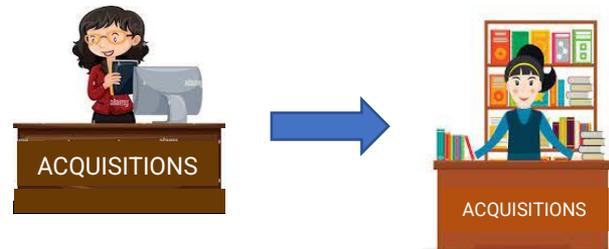
Citation type	Count
Book	26
Journal	2

Material Type	Count
Physical	28

Request ID	Requester	Status	Created on	Updated on	Cost
1	Mancini, Paola	In Review	07/09/2023	07/09/2023	0.00 EUR

Alma workflow for purchase requests

- the *Purchase request manager* role allows the Alma user to assign PR to a PR operator
- if the purchase is approved, the PR operator enters in the PR the:
 - ✓ Owing library, then
 - ✓ Cost
 - ✓ Fund
 - ✓ Vendor



Request Attributes

Requester *	Mancini, Paola	X	☰	↻
Interested users	<input type="checkbox"/> Hold item	<input checked="" type="checkbox"/> Notify upon cancellation		
	<input checked="" type="checkbox"/> Notify user upon receiving/activation			
Created from	Manually			
Request status	In Review			
Owning Library	Firenze			▼
Estimated cost	0.00			EUR ▼
Fund			☰	↻
Vendor/Account			☰	↻
Approved by	-			
Requester note				

Alma workflow for purchase requests

- the *Purchase request* clicks on APPROVE AND ORDER button

1	<input type="checkbox"/>	Marcovaldo Citation type: Book Request status: In Review PO Line Reference: - Requester: Mancini, Paola 	Created on: 07/09/2023 Updated on: 07/09/2023 Cost: 20.00 EUR Requested for library: Firenze	Edit Approve and Order ...
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- the order is created
- the request status is **Approved**

<input type="checkbox"/>	Marcovaldo Citation type: Book Request status: Approved PO Line Reference: POL-22227 Requester: Mancini, Paola 
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- The Alma workflow for the purchase request is finished

Alma workflow for purchase requests

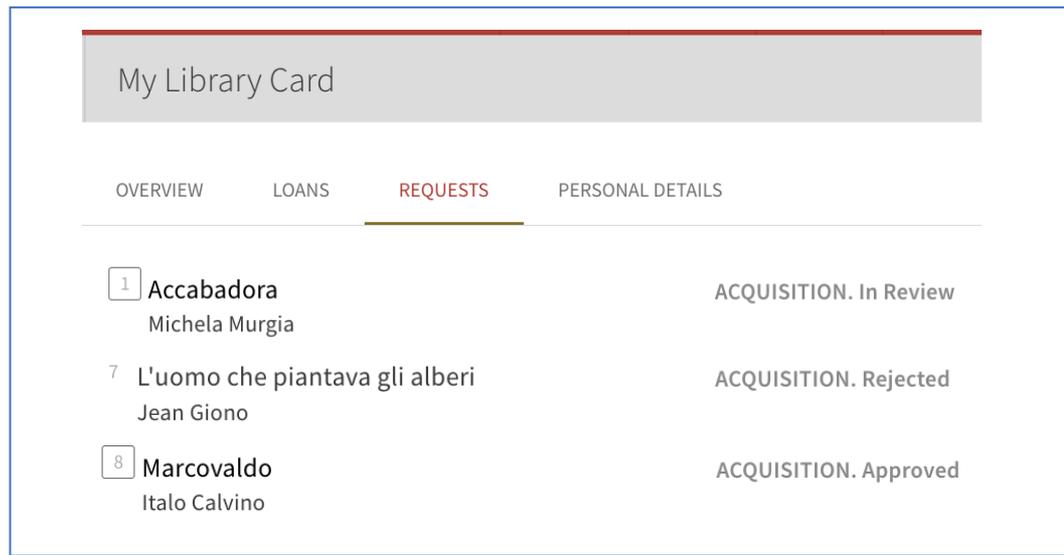
- The action REJECT is for rejecting the PR

1	<input type="checkbox"/>	Accabadora	Created on: 07/09/2023	Reject
		Citation type: Book	Updated on: 07/09/2023	Send query to requester
		Request status: In Review	Cost: 0.00 EUR	Assign to
		PO Line Reference: -		
		Requester: Mancini, Paola 		

- A notification is sent to the user
- The Alma workflow for the purchase request is finished

Purchase requests in User's Library Card

- The user's library card on Primo shows all the user's requests with status
- Possible status for PR are:
 - ✓ In Review
 - ✓ Approved
 - ✓ Rejected



The screenshot shows a user's library card interface. At the top, there is a header "My Library Card". Below it, there are four tabs: "OVERVIEW", "LOANS", "REQUESTS" (which is highlighted with a red underline), and "PERSONAL DETAILS". The "REQUESTS" tab displays a list of three purchase requests, each with a small square icon containing a number, the title and author, and the status.

Icon	Title	Author	Status
1	Accabadora	Michela Murgia	ACQUISITION. In Review
7	L'uomo che piantava gli alberi	Jean Giono	ACQUISITION. Rejected
8	Marcovaldo	Italo Calvino	ACQUISITION. Approved

Weaknesses in purchase request feature

The purchase requests feature seems 'raw', not as developed as it could be:

- Only 1 action for moving on in management (Approve and Order):
 - ✓ **Approve** is 1 operation
 - ✓ **Order** is 1 operation
- Request can be in one of 3 states (In review, Approved and Rejected):
 - ✓ Not possible to distinguish between
 - **new PR**
 - **managed, but not ordered PR**
- Only 3 roles for Alma users (PR operator, PR operator extended and PR manager):
 - ✓ all of them can view (assign) **funds** and **vendors ALSO IF** Alma user has not the relevant roles

A different scenario

The APPROVER OPERATOR is different from the PURCHASER OPERATOR



- A new role, **PURCHASE REQUEST APPROVER**
 - ✓ no possibility to order, no view of funds and vendors
- A new operation, **APPROVE**
 - ✓ status **Approved** doesn't mean Ordered anymore
- A new PR status, **ORDERED**
 - ✓ order created



A workaround

- All APPROVERS have the **PR operator extended** role
- For request to reject, directly select the REJECT action
- For request to approve, select the **library TO BE ORDERED** as the OWNING LIBRARY
- They **HAVE NOT to enter** data in the **FUND** and **VENDOR** fields
- Finally, choose the action **RELEASE ASSIGN**

Request status	In Review
Owning Library	To be ordered
Estimated cost	0.00
Fund	
Vendor/Account	

Accabadora
Citation type: Book
Request status: In Review
PO Line Reference: -
Requester: Mancini, Paola 

Created on: 07/09/2023
Updated on: 08/09/2023
Cost: 0.00 EUR

[Edit](#) [Approve and Order](#) [...](#)

[Reject](#)
[Send query to requester](#)
[Assign to](#)
[Release assignment](#)
[Relink](#)

On the PR Desktop:

- APPROVED REQUEST → PR with status = In Review AND Requested for library = TO BE ORDERED
- NEW REQUEST → PR with status = In Review

<input type="checkbox"/>	Big in Japan. Come perdersi a Tokyo e imparare ad amarla	Edit Approve and Order ...
	Citation type: Book	Created on: 08/09/2023
	Request status: In Review	Updated on: 08/09/2023
	PO Line Reference: -	Cost: 0.00 EUR
	Requester: Mancini, Paola 	
<input type="checkbox"/>	Accabadora	Edit Approve and Order ...
	Citation type: Book	Created on: 07/09/2023
	Request status: In Review	Updated on: 08/09/2023
	PO Line Reference: -	Cost: 0.00 EUR
	Requester: Mancini, Paola 	Requested for library: To be ordered

Problems with this workaround

APPROVER has to strictly follow instructions

- if APPROVER clicks on the APPROVE AND ORDER button
 - ✓ PR status = Approved
 - ✓ An order is created
 - ✓ Requested for library = TO BE ORDERED is a dummy library, not the final one
 - ✓ The library-location can be corrected in the order the BUT not in the PR owning library

➡ not possible to distinguish an ordered PR from an approved PR with an order

Accabadora	View Delete
Citation type: Book	Created on: 07/09/2023
Request status: Approved	Updated on: 08/09/2023
PO Line Reference: POL-22251	Cost: 0.00 EUR
Requester: Mancini, Paola 	Requested for library: To be ordered
Marcovaldo	View Delete
Citation type: Book	Created on: 07/09/2023
Request status: Approved	Updated on: 07/09/2023
PO Line Reference: POL-22227	Cost: 0.01 EUR
Requester: Mancini, Paola 	Requested for library: Firenze

Problems in the purchase request feature

Other reasons because the purchase requests feature seems 'raw', not as developed as it could be:

- Not possible to use any PO LINE TEMPLATE
- Not possible to choose the PURCHASE TYPE
- PR status REJECTED is the same if PR is rejected by the library or cancelled by the requester
- PR status remains APPROVED when:
 - ✓ The material arrives
 - ✓ The order is not done (e.g. low budget)
 - ✓ The order is sent and then cancelled (e.g. out of stock)
- Analytics reports are more complicated
- ISSN in the form is not verified on the existing resources



in the user's library card
the PRs are **APPROVED**

- The Purchase request module has some problems
- Missing functions and possible workaround
- Necessary some improvements



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Thank you
for your attention!

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