

USING PURCHASE REQUESTS TO INCREASE BOOK ORDERING

Or, using purchase requests to increase Faculty ordering.

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Seymour Library, Knox College

Let Alma do the work for you....

- Keep track of order requests coming at you from faculty members, perhaps other librarians, and whoever else you allow to make book purchasing selections.
- Users can specify the format they want: print or electronic
- Liaison librarians can approve orders

How to Request: From I-Share



BOOK
Catching the light
Harjo, Joy, author.
2022

 Check for available services >

TOP

SEND TO

HOW TO GET IT

LINKS

DETAILS

Send to



QR



EXPORT RIS



ENDNOTE



REFWORKS



PRINT



CITATION



EMAIL



PERMALINK

How to get it

Request Item via I-Share >

Purchase Request >



How to Request: Manual Form

LIBRARY HOME

Knox College Library Home Page

NEW SEARCH

Start a new search

ALL I-SHARE LIBRARIES SEARCH

Search all I-Share libraries

ALPHABETICAL SEARCH

Browse Search

DATABASES A-Z

Databases A-Z

QUESTIONS? ASK US

Chat with a librarian

JOURNAL SEARCH

Find a journal

RESEARCH GUIDES

Research Guides

FIND BY CITATION

Find an article by citation

PURCHASE REQUEST

Blank Purchase Request

Request form

- On the manual form, users can fill in as much or as little as they want.
- I ask them to leave a Requester note if they'd like to pick up the item when it arrives or if it needs to go on Reserve.

Purchase Request

Citation Type Book Journal



Material Type Electronic Physical

Choose Type:

Book ▾

Title

* Catching the Light

Author

Joy Harjo

Edition

ISBN

0300257031

Publisher

Publication year

2022

Requester Note

Place on hold for me



 RESET FORM

 SEND REQUEST



Alma

Welcome, Heideman, Gail | 11/04/2022

Acquisitions

Resources

Fulfillment

Admin

Analytics



Recent Pages



Monitor Jobs

Administration



Scan In Items

Fulfillment



Review (PO line)

Acquisitions



Review (PO)

Acquisitions

Tasks

7

Purchase Requests



5

In Review - assigned to you

2

In Review - unassigned

79

DARA Recommendations



25

Order Lines



3

Invoices



8

Items



17

Electronic Resources



99

Reading Lists



613

Citations



Acquisitions -> Purchase Requests -> Manage Purchase Requests

Manage Purchase Requests

Facets << < Manage Purchase Requests (1 - 1 of 1) Reject Selected

Citation type
Book (1)

Material Type
Physical (1)

Requester
Heideman, Gail (1)


Created from reading list
No (1)



Assigned to Me Unassigned Assigned to Others

All

0 rows selected

Select All

1 <input type="checkbox"/>	Catching the Light Citation type: Book Request status: In Review PO Line Reference: - Requester: Heideman, Gail 	Created on: 11/04/2022 Updated on: 11/04/2022 Requester note: Place on hold for me	<input type="button" value="Edit"/> <input type="button" value="Approve and Order"/> <input type="button" value="More"/>
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- Reject
- Send query to requester
- Assign to
- Relink

My Work Flow:

1. Check to see who requested
2. Faculty requests are assigned to Liaison Librarian
3. Librarian requests move forward to Checking Bib record.

Liaison approval -> Assign to another librarian

The screenshot shows a modal window for assigning a liaison approval. It features a dropdown menu for 'Assign To' currently set to 'Administrator, Alma', a text area for 'Note', and a checked checkbox for 'Send as E-mail'. At the bottom right are 'Cancel' and 'Assign To' buttons. A footer indicates 'Created on: 11/04/2022'. Three red arrows point to the dropdown menu, the 'Note' field, and the 'Send as E-mail' checkbox.

Assign To: Administrator, Alma

Note

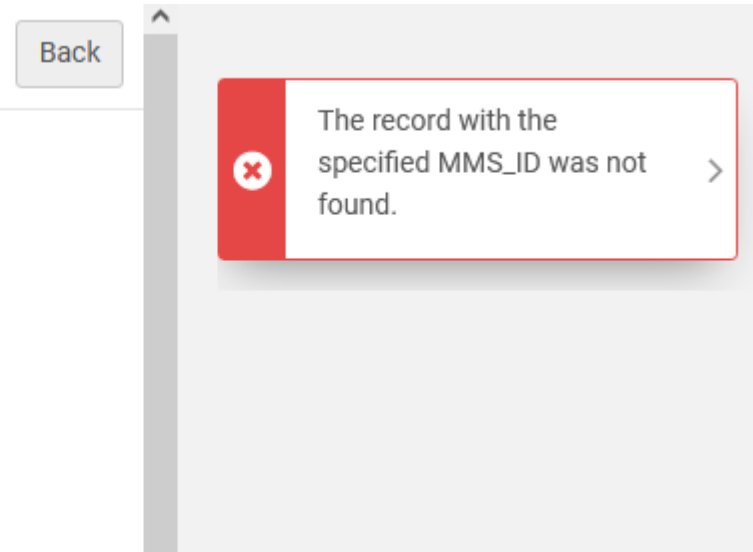
Send as E-mail

Cancel Assign To

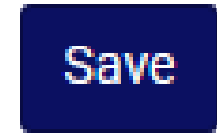
Created on: 11/04/2022

Common Error: Bib not found

When I or another librarian would click on the Title of the book to see the record, it will give us this error screen:



Simple solution: Click the EDIT button and use the Relink option
(If you have the PR Manager role)



Required Edit: Owning Library

< Purchase Request

Relink

Cancel

Save

Place of publication **new haven .**

Note **The 2021 Windham-Campbell Lecture**

Volume

Request Attributes

Requester * **Heideman, Gail**

Interested users

Hold item

Notify upon cancellation

Notify user upon receiving/activation

Created from **External System**

Request status **In Review**

Owning Library **Seymour Library**

Estimated cost **20.00**

USD

Fund **Books-7660 BOOKS (FY-2023) (18,965.98 USD)**

Vendor/Account **MLS/Midwest Library Service/MLS/Midwest Library Service**

Approved by -

Requester note

Place on hold for me

Rejection reason -

+ Add Location

Now you can Approve and Order (PR becomes POL)

< Manage Purchase Requests (1 - 7 of 7)

Reject Selected

Assigned to Me

Unassigned

Assigned to Others

Select All

All ▾



1



Catching the light /

Citation type: Book

Request status: In Review

PO Line Reference: -

Requester: Heideman, Gail

Created on: 11/04/2022

Updated on: 11/04/2022

Cost: 20.00 USD

Requested for library: Seymour Library

Requester note: Place on hold for me

Edit

Approve and Order



Approved email



Regarding your purchase request

11/04/2022

Gail Heideman
Campus Box 227
2 E. South Street
Galesburg, IL 61401

Seymour Library
371 S. West Street
Galesburg, 61401
309-341-7246

Hello,

Your purchase request with the following information has been approved and an order has been created POL-1804.

Title: Catching the light /.

Sincerely

Seymour Library Acquisitions

POL is now ready for me to edit to so that I can start the purchase process.

Purchase Order Lines in Review (1 - 1 of 1)

Assigned to Me **Unassigned** Assigned to Others

All

Expand

1



Catching the light / Joy Harjo., New Haven :, Yale University Press,, 2022, 9780300257038, ISBN

MMS ID: 993450325705854

Type: Physical - One Time

PO line owner: Seymour Library

Standard number: 9780300257038

PO: -

PO line: POL-1804 / (In Review)

Physical One Time (1)

Copies: Seymour Library - HSL: Main Stacks (1)

Total price: 20.00 USD

Funds: Books-7660 (100.0%) (FY-2023)

Vendor/Account: Midwest Library Service / Midwest Library Service MLS

Vendor reference ID: -

Expected delivery: -

Receiving note: -

Has interested users

At least one of the reporting codes is missing

Edit Order Now



HOW DO I SET UP PURCHASE REQUESTS?

Purchase Requests: Alma config

Alma config > Discovery > Get It configuration > Purchase request

	Display to Public		Field	Default	Mandatory
1	Yes	▼	author		<input type="checkbox"/>
2	Yes	▼	edition		<input type="checkbox"/>
3	Yes	▼	isbn		<input type="checkbox"/>
4	No	▼	issn		<input type="checkbox"/>
5	No	▼	lccNumber		<input type="checkbox"/>
6	No	▼	oclcNumber		<input type="checkbox"/>

Alma documentation:

Purchase requests is a service exposed from Alma to Primo. Like any other service, it can be hidden from groups of users using Alma's **Display Logic Rules**. This service is initially hidden from users by default with the rule Hide Service Purchase Request.

To enable the service for all Primo users, remove this rule.

Purchase Requests: Alma config

Alma config > Discovery > Fulfillment > Discovery Interface Display Logic > Display Logic Rules

Edit Rule

For user from
groups

hide service *

Purchase Request 

with

Ownership by the institution

with value *

True

if service
exists

Purchase Requests: Alma config

Alma config > Discovery > Fulfillment > Discovery Interface Display Logic > Display Logic Rules

Edit Rule

For user from groups

Honors Student ✕

Local Patron ✕

Undergraduate Student ✕



hide service *

Purchase Request ✕



with



with value

-



if service exists



Purchase Requests: Alma config

Alma config > Discovery > Fulfillment > Discovery Interface Display Logic > Display Logic Rules

Edit Rule

For user from
groups

hide service *

Purchase Request ✕

with

with value

if service
exists

General Electronic Service ✕

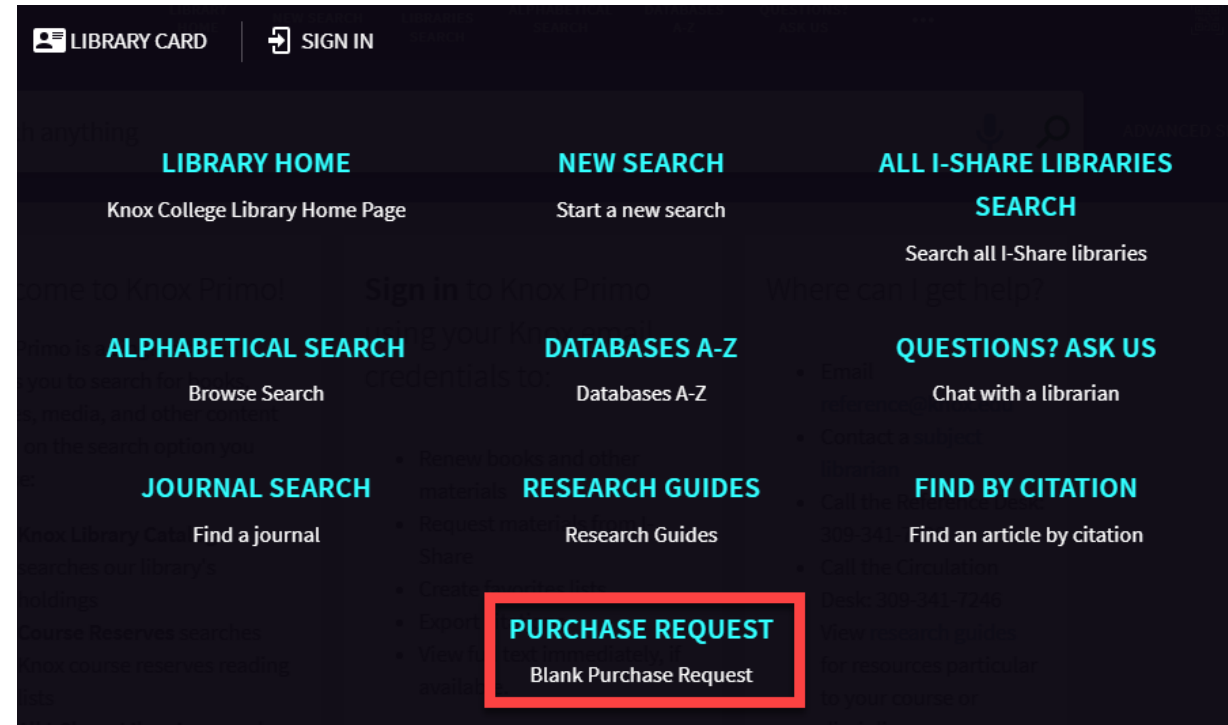
with

Service

with value *

Tipasa Article Request

Purchase Requests: Get a link



https://i-share-knx.primo.exlibrisgroup.com/discovery/purchaseRequest?vid=o1CARLI_KNX:CARLI_KNX

Purchase Requests: Link form to [website](#)

Getting & Linking to Resources

Linking to E-resources

Linking to Knox Resources in
Google Scholar

Decolonizing the Syllabus
Bibliography [↗](#)

Faculty Select for OER

Open Education Resources [↗](#)

Getting Ebooks

Getting Films

Librarians & Research Service

Library Instruction

Ordering Library Materials

Ordering Books and Films

Faculty in each department or program may suggest materials for the library to purchase based on the curricular needs of their department. The collection is meant to support student coursework and student research.

Each academic department has a librarian assigned to be their liaison. Your liaison can help you with any questions you have about ordering or if you would like assistance identifying titles in certain subject areas or formats that are available for purchase.

Placing orders

Orders can be submitted using [this form](#). You will need to log into Knox Primo to make the purchase request.

The form requires at minimum the title of the book and the format you prefer. The more information you provide, the faster we can process your request. Your liaison will be in touch if they have questions.

Please submit orders 3 weeks before they are needed to give the library staff time to order and process the book. Some books may take longer to order, and your liaison will inform you of any delays.

Checking on orders

Contact your librarian liaison to check on an order or if you have any questions.

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