

Become
an
Expert

Leganto



Session 5: Purchasing Workflows

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Leganto – Become an Expert: Class Sessions

Session	Topic	Date
1	Automating Library Processing	Jan. 27
2	Bulk Rollover of Reading Lists	Feb. 17
3	Digitization and Copyright Overview	Mar. 17
4	Optimizing the Instructor Experience	Apr. 14
5	Purchasing Workflows	May 19
6	Actionable Analytics	June 16

Register for upcoming sessions:

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Agenda

- **Overall Purchase-Request Workflow**
- Manual Requests
- Automate Requests
- Challenges and Solutions
- Rialto (very briefly)
- Alternative Options
- Resources



Overall Purchase-Request Workflow

Leganto

- Identify items which are on reading lists
- Understand how the resource will be used in the course
- Compare to existing library inventory
- Inform Acquisitions of course related purchasing needs



Alma

- Review purchase requests
- Understand context (course, priority, existing collection)



Purchase



Leganto

- Update reading list

Agenda

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Purchase Request from Citation

< Edit Reading List

Print Slip

Print Slip Report

Back

Save

Owners: Henry Simpson ; Sara Instructor ; D2L Admin1

Pages 599

Citations

Courses

Owners

Notes

Subject

Sort by: Last created 1 - 10 of 10

Place Request

+ Add Citation

☐ Select All

Alerts: ▾

Citation Status: All ▾

Citation Last Modification
Date

Ask Support to
activate this option for
course-reserves roles

Resource Locate

Purchase Request

Resource Sharing Request

Remove

Duplicate

Check CLA Permission

Find A Pay-Per-Use License

View in Leganto

Attach Existing File

Manual Locate

Edit

Set Complete

...

1 ☐ Think Again: The Power of Knowing What You Don't Know

Book By Adam Grant (Viking
February 2, 2021)

ISBN: 978-1984878106

Citation ID: 5795708670000121

Request Status: Being Prepared

Resource Locate Status: Information Incomplete

Copyright Status: Approved

Section Name: Essential Reading

Created By: Jessie Ransom
10/18/2021 21:18

Modified By: Jessie Ransom
10/18/2021 21:18

Physical

Electronic

Digital

● Other(1)

Citation Details

Alerts

2 ☐ Psychology as the Science of Self-Reports and Finger Movements: Whatever Happened to Actual Behavior?

Article By Author(s): Roy F.
Baumeister, Kathleen D. Vohs and
David C. Funder (Sage
Publications)

Request Status: Being Prepared

Resource Locate Status: Information Incomplete

Copyright Status: Not Determined

Section Name: Essential Reading

Created By: Henry Simpson
06/16/2021 22:17

Modified By: Henry Simpson

Edit

Set Complete

...

Intro to Psychology

Course Code:

PSYC 101

Course Name:

Intro to Psychology

Section:

-

Processing Department:

Main Library

Instructors:

Sara Instructor; D2L Admin1

Number of participants:

20

Campus

-

[View in Leganto](#)

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Scenario #1

The instructor actively makes a request

- Direct the instructor to add a specific tag, for example, “Purchase,” to initiate the request



Sample Rule for Scenario #1

Configuration Menu > Fulfillment > Courses > Citation Processing Rules

Purchase Workflow Rule Editor

Name *

Purchase Tag

Description

Created By

Jim Benson

Created On

02/11/2020

Updated By

Bettina Schmid

Updated On

03/02/2021

Input Parameters

+ Add Parameter

	Name	Operator	Value	
1	Citation Tag	In List	Purchase	...

Workflow Setup

Request Format

Electronic

Scenario #2

The library reviews all resources (or all with an essential tag, for example) and determines which should be purchased, regardless of instructor request

- Create one or more rules based on existing inventory, material type, number of students, tag, etc.
- Note that the name of the rule displays on the purchase request. Name it something useful!



Sample Rule A for Scenario #2

Purchase Workflow Rule Editor

Name *

Tagged as Essential, no electronic copy

Description

Created By

Jessie Ransom

Created On

12/21/2020

Updated By

Jessie Ransom

Updated On

01/15/2021

Input Parameters

+ Add Parameter

	Name	Operator	Value	
1	Available in Electronic	=	False	...
2	Citation Tag	=	Essential	...

Workflow Setup

Request Format

Electronic

Sample Rule B for Scenario #2

Purchase Workflow Rule Editor

Name *

Title in stock but not electronic

Description

Created By

Bettina Schmid

Created On

01/20/2021

Updated By

Jessie Ransom

Updated On

10/13/2021

Input Parameters

+ Add Parameter

	Name	Operator	Value	
1	Available in Electronic	=	False	...
2	In Repository	=	True	...
3	Number of Students	Greater than	9	...

Workflow Setup

Request Format

Electronic

Sample Rule C for Scenario #2

Purchase Workflow Rule Editor

Name *

Essential, no E, fewer than 1 copy per 20 student

Description

Created By

Jessie Ransom

Created On

05/25/2021

Updated By

Jessie Ransom

Updated On

05/25/2021

Input Parameters

+ Add Parameter

	Name	Operator	Value	
1	Available in Electronic	=	False	...
2	Citation Tag	=	Essential	...
3	Item to Student Ratio	Less than	.05	...

Workflow Setup

Request Format

Electronic

Scenario #3

In certain circumstances, the library asks the instructor if they would like to make a request

- Leverage the Questions feature to solicit more information from instructors
- Add a tag based on the answer to the question
- Trigger a rule based on the tag



Sample Question

You've Added a Physical Item

Physical items are not available this semester. What would you like the library to do with this resource?

☐ Purchase an ebook

☐ Digitize a portion

Pages: To:

☐ Recommend an alternative resource

☒ None of the above

Sample Rule for Scenario #3

Purchase Workflow Rule Editor

Name *

Purchase Tag

Description

Created By

Jim Benson

Created On

02/11/2020

Updated By

Bettina Schmid

Updated On

03/02/2021

Input Parameters

+ Add Parameter

	Name	Operator	Value	
1	Citation Tag	In List	Purchase	...

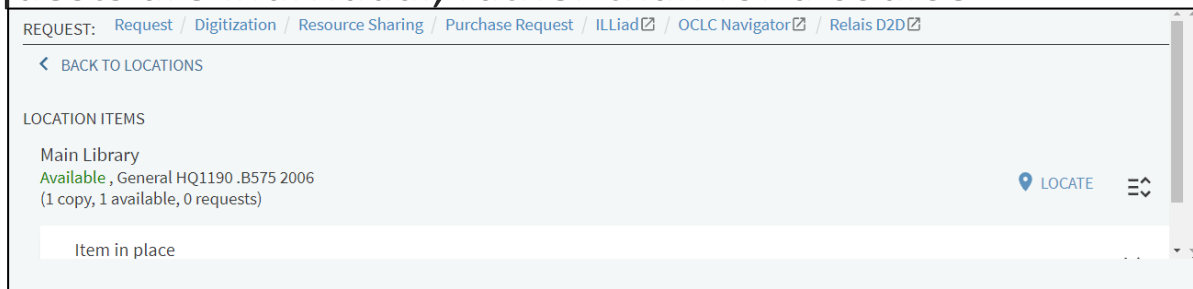
Workflow Setup

Request Format

Electronic

A Note about Patron Purchase Requests...

- Alma supports patron purchase requests
- Request option can display in discovery, according to display logic rules
 - Don't have to enable in discovery to leverage for Leganto
- Option can display in Leganto
 - Not for all resources
 - Requests are individual, rather than for a course



Patron vs Course-Related Purchase Requests...

Requester note

can you buy this for my course?

VS

Course Information							
▲ Code	Section	↕ Name	↕ Processing Department	Academic Department	Number Of Participants	Instructor	Term
1 MHA-2015	-	Military History of Australia	Main Library		35	Multiple 	-
Number of total copies 0							
Citation Tag -							
Created automatically by rule -							

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Issue 1: PO Line vs EOD and API

Purchase Request workflow creates a PO Line, which will not be linked to the PO Line created by the Embedded Order Data (EOD) or the API



Solution: Reject Purchase Requests

Reject the purchase request, with a rejection reason such as “Order via Oasis” or “Order via GOBI”

Acquisitions Configuration > Purchase Requests > Purchase Request Reject Reasons

	Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated	
1	☒		▼	COST	Cost	Cost	☐	jransom	09/17/2021	...
2	☒	▲	▼	CANCELLED_BY_REQUESTER	Canceled by requester	Canceled by requester	☐	jransom	09/17/2021	...
3	☒	▲	▼	IRRELEVANT	Irrelevant	Irrelevant	☐	jransom	09/17/2021	...
4	☒	▲	▼	DUPLICATE	Duplicate	Duplicate	☐	jransom	09/17/2021	...
5	☒	▲		GOBI	Cancel PR, order through Gobi	Cancel PR, order through Gobi	☐	jransom	09/17/2021	...

Solution (cont.): Configure Notification Letter

But rejection causes a notification letter to be sent!

To prevent that, configure the notification letter to **not** be sent for certain rejection reasons:

Configuration > General > Letters Configuration > Purchase Request Status Letter

Add these lines to the letter:

```
<xls:mssage terminate="yes">reject reason is GOBI</xls:message>
```

NOTE: The **code** here must match the Code for the Purchase Request Reject Reason

Notification Letter Revised

[Purchase Request Status Letter](#)

Labels Template Letter Examples

Restore

XSL:

```
<xsl:call-template name="head" /> <!-- header.xml -->
<xsl:call-template name="senderReceiver" /> <!-- SenderReceiver.xml -->

<br />
<xsl:call-template name="toWhomIsConcerned" /> <!-- mailReason.xml -->
<table role='presentation' cellspacing="0" cellpadding="5" border="0">
  <tr>
    <td>@@introduction@@
    <xsl:message terminate="yes">reject reason is GOBI </xsl:message>
  </td>
</tr>
</table>
<xsl:choose >
  <xsl:when test="/notification_data/purchase_request/request_status='APPROVED'">
    @@approved@@ <xsl:value-of select="notification_data/purchase_request/poline_reference" />.
  </xsl:when>
  <xsl:otherwise>
    @@rejected@@: <xsl:value-of select="notification_data/purchase_request/reject_reason_desc" />.
```

Issue 2: Citation Doesn't Include New Inventory

If using a separate purchasing workflow (like API or EOD):

Once the resource has been acquired, the citation needs to be updated with the new inventory and potentially new metadata

Solution: Resource Locate

- Individually, from the citation in Alma
 - Note also option to perform [manual locate](#)
- In bulk:
 - [Process and Enrich Citations Job](#) (**Fulfillment > Advanced Tools - Reading Lists**)
 - Run the job regularly, especially when doing a lot of course-related purchasing

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Leganto Helps Identify Purchasing Requirements

Leganto

- Identify items which are on reading lists
- Understand how the resource will be used in the course
- Compare to existing library inventory
- Inform Acquisitions of course related purchasing needs



Alma

- Review purchase requests
- Understand context (course, priority, existing collection)



~~Purchase~~



Leganto

- Update reading list

With Rialto: an Integrated and Streamlined Experience

Leganto

- Identify items which are on reading lists
- Understand how the resource will be used in the course
- Compare to existing library inventory
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Alma

- Review purchase requests
- Understand context (course, priority, existing collection)



Rialto

- Review purchase requests
- Understand context (course, priority, existing collection)
- Review offers from several providers
- Purchase
- Track purchase and inventory automatically in Alma



Leganto

- **Automatically** notify course reserves staff of status
- **Automatically** update reading list with new inventory

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Tags or Citation Statuses

Create designated [tags](#) or [citation statuses](#) to mark citations as requiring purchase

- Which one? Depends on who is marking the citation:
 - Citation status is easier if you work in Alma
 - Tags are easier if you work in Leganto
- Provide a means for Acquisitions Team to review citations
 - Via Alma
 - Filtering task lists by status or tag
 - Via Analytics

Leverage Analytics

- Build a report that identifies candidates for purchase
- Set the report up as a scheduled report
 - Acquisitions staff subscribe to the report



Sample Analytics Report

Course	Reading List Citation	Citation Metadata Details			Reading List Citation
 Course Code 	 Citation Library Tags 	 Title 	 Author 	 ISBN 	 Permalink 

▲ Filters

 Citation Library Tags is equal to / is in PR
AND  "Reading List Citation"."Citation Modification Date" >= TIMESTAMPADD(SQL_TSI_DAY, -7, CURRENT_DATE)

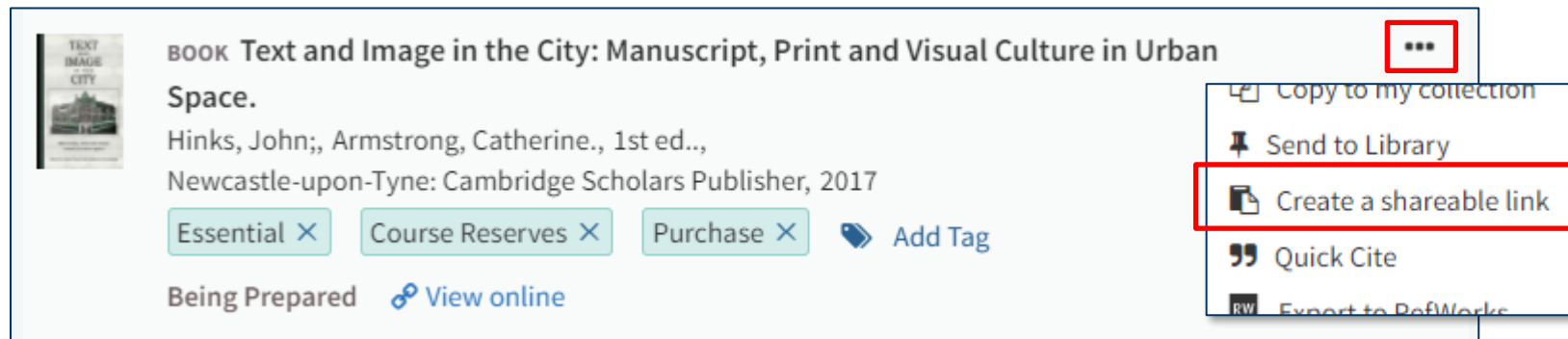
[Documentation: Filtering by relative dates in Analytics reports](#)

Sample Report

Course Code	Citation Library Tags	Title	Author	ISBN	Permalink
LAW 752	PR	Belonging At Work: Everyday Actions You Can Take to Cultivate an Inclusive Organization	Rhodes Perry MPA	1732441901	https://na02.alma.exlibrisgroup.com/leganto/public/EXLDEV1_INST/citation/5082484330000121?auth=local
		Blindspot	Banaji, Mahzarin R.	9780345528438	https://na02.alma.exlibrisgroup.com/leganto/public/EXLDEV1_INST/citation/5082470450000121?auth=local
		Building an Inclusive Organization : Leveraging the Power of a Diverse Workforce	Frost, Stephen; Alidina, Raafi-Karim	9780749484293	https://na02.alma.exlibrisgroup.com/leganto/public/EXLDEV1_INST/citation/5082336010000121?auth=local
		Inclusion: Diversity, The New Workplace & The Will To Change	Jennifer Brown	1946384097	https://na02.alma.exlibrisgroup.com/leganto/public/EXLDEV1_INST/citation/5082470490000121?auth=local
SOCSCI301	PR	Ozark Magic and Folklore	VANCE RANDOLPH	978-0486211817	https://na02.alma.exlibrisgroup.com/leganto/public/EXLDEV1_INST/citation/5624299520000121?auth=local
		Sons of the mountains : the Highland Regiments in the French and Indian War, 1756-1767	McCulloch, Ian M.	1930098758	https://na02.alma.exlibrisgroup.com/leganto/public/EXLDEV1_INST/citation/5624298400000121?auth=local
		The Magic Mountain: [Complete & Annotated]	Thomas Mann	978-6257120258	https://na02.alma.exlibrisgroup.com/leganto/public/EXLDEV1_INST/citation/5624299480000121?auth=local

Create Permalink for Leganto Citation – Step 1

In Leganto, get a “shareable link” to any citation:



BOOK Text and Image in the City: Manuscript, Print and Visual Culture in Urban Space.

Hinks, John; Armstrong, Catherine., 1st ed.,
Newcastle-upon-Tyne: Cambridge Scholars Publisher, 2017

Essential × Course Reserves × Purchase × Add Tag

Being Prepared View online

- Copy to my collection
- Send to Library
- Create a shareable link
- Quick Cite
- Export to RefWorks

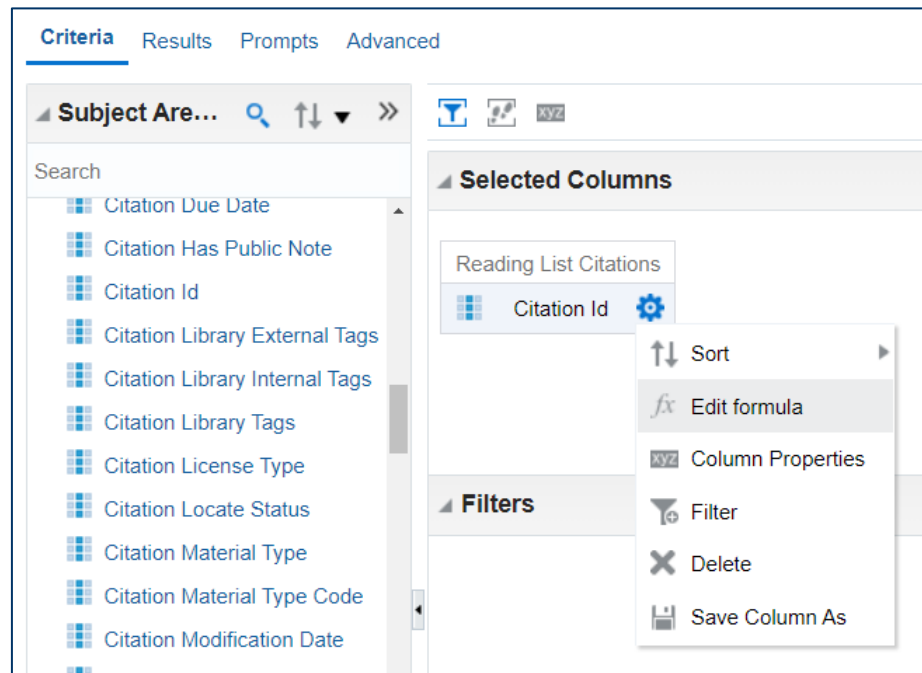
It will look something like this:

https://na02.alma.exlibrisgroup.com/leganto/public/EXLDEV1_INST/citation/4731391040000121?auth=local

Create Permalink for Leganto Citation – Step 2

In Alma Analytics, in the report you are creating:

1. Subject Area = **Course Reserves**
2. From the **Reading List Citations** group, add the field **Citation ID** to your report.
3. On that field, **Edit formula**.



Create Permalink for Leganto Citation – Step 3

1. Delete the formula that is there
2. Paste in the URL you got from Leganto
3. Replace the yellow part below as shown:

<https://na02.alma.../citation/4731391040000121?auth=local>

[https://na02.alma.../citation/' || "Reading List Citation"."Citation Id" || '?auth=local](https://na02.alma.../citation/' ||)

Syntax is very important!

Create Permalink for Leganto Citation – Step 3 (cont.)

Edit Column Formula

Column Formula Bins

Folder Heading Reading List Citation

Column Heading Permalink

☒ Custom Headings

☐ Contains HTML/JavaScript/CSS Markup

Aggregation Rule (Totals Row) Default (None) ▼

Available

Subject Areas

Course Reserves

Column Formula

`"https://na02.alma.exlibrisgroup.com/leganto/public/EXLDEV1_INST/citation/" || "Reading List Citation" "Citation Id" || "?auth=local"`

(optional)
Change Heading to
"Permalink"

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Documentation and Videos

- [Purchase Request Documentation](#)
- [Filtering by relative dates in Analytics reports](#)
- [Create a Scheduled Analytics Report](#)
- [Leganto Purchasing and Acquisition Workflow Video](#)
- Leganto-Rialto workflow via [purchase requests](#), or via [reading lists/citations](#) directly.
- [Leganto What's New Videos](#)





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