To Buy or Not To Buy?

Using Evergreen to create purchase requests
How we kept track:

Access Database!
Yikes!
So many requests!
Did I put a request in for...?
We added notes.

Lots and lots of notes.
What next?

Compared the Access Database to Evergreen.

Added to Baker & Taylor Carts.

Added notes to the database indicating status.

Weekly we checked Evergreen for when the titles showed in the system.

Once the item was in the system, we placed holds and updated the Access Database.
Enter Patron Requests
How we made it faster, easier, and more efficient using Evergreen.
Create the request

![Request Form](image1.png)

- **Title**: The title goes here
- **Author**: Authos goes here
- **ISxN**: ISBN
- **Article Title**: 
- **Article Pages**: 
- **Request Type**: Books
- **Volume**: 
- **Publication Date**: 
- **Publisher**: 
- **Publication Location**: 
- **Other Info**: 40693  TT Bill to circ
- ** Mentioned In**: 
- **Need Before Date/Time**: 
- **PO Line Item**: 
- **Pickup Library**: 333
- **Place Hold**: 
- **Request Date/Time**: 
- **User**: 1940023

![Request Form](image2.png)

- **Publication Date**: 
- **Publisher**: 
- **Publication Location**: 
- **Other Info**: 40693  TT Bill to circ
- ** Mentioned In**: 
- **Need Before Date/Time**: 
- **PO Line Item**: 
- **Pickup Library**: 333
- **Place Hold**: 
- **Request Date/Time**: 
- **User**: 1940023

**Buttons**:
- **Cancel**
- **Save**
### View requests by patron

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Author</th>
<th>ISBN</th>
<th>Article Title</th>
<th>Article Pages</th>
<th>Request Type</th>
<th>Volume</th>
<th>Publication Date</th>
<th>Publisher</th>
<th>Publication Location</th>
<th>Other Info</th>
<th>Mentioned In</th>
<th>Need Before Date/Time</th>
<th>Place Hold</th>
<th>Request Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The Girl in the Spider's Web</td>
<td>97862175520640</td>
<td>DVDs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>KU-49230209765641 Bill to Circ.</td>
<td></td>
<td>True</td>
<td>12/21/19 9:26 AM</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Venom</td>
<td>9786317514713</td>
<td>DVDs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>KU-49230209765641 Bill to Circ.</td>
<td></td>
<td>True</td>
<td>12/21/19 9:24 AM</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Air Strike</td>
<td>97866117539770</td>
<td>DVDs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>KU-49230209765641 Bill to Circ.</td>
<td></td>
<td>True</td>
<td>12/21/19 9:23 AM</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Aquaman</td>
<td>Morina, Jason</td>
<td>00883528624331</td>
<td>DVDs</td>
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<td></td>
<td>BC-4089302076706 Bill to circ.</td>
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<td>1/23/19 12:00 AM</td>
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</tr>
<tr>
<td>5</td>
<td>Creed II</td>
<td>Jordan, Michael O.</td>
<td>00883529765522</td>
<td>DVDs</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>BC-4089302076706 Bill to circ.</td>
<td></td>
<td>True</td>
<td>1/23/19 12:00 AM</td>
<td></td>
</tr>
</tbody>
</table>
Editing a request
View requests
From Acquisitions
# The Full List

![Image of a table with titles, authors, and other details for various books, DVDs, and records.](image.png)
Sorting Requests and Building Selection Lists
Then Into Your Purchase Order
And the Book is Ordered and the Hold is Placed
## Duplicate holds

<table>
<thead>
<tr>
<th>Hold Type</th>
<th>Title Proper (normalized)</th>
<th>Author (normalized)</th>
<th>Hold ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>T</td>
<td>Run away</td>
<td>Coben, Harlan 1992</td>
<td>2</td>
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<tr>
<td>T</td>
<td>The Cornwalls are gone</td>
<td>Patterson, James 1947-</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>The First Lady</td>
<td>Patterson, James 1947-</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>One Good Dead</td>
<td>Baldacci, David</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>Redemption</td>
<td>Baldacci, David</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>The First Lady</td>
<td>Patterson, James 1947-</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>Redemption</td>
<td>Baldacci, David</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>Dixie June: A Novel</td>
<td>Stevens, Madeline</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>Never Look Back</td>
<td>Caplin, Alison</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>Vice</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>The happy prince</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>The matriarch: Barbara Bush and the making of an American dynasty</td>
<td>Page, Susan</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>The First Lady</td>
<td>Patterson, James 1947-</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>Benson legal: Season four</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>FIND ME</td>
<td>ADIUMAN, ANDR</td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>A dog's way home</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>A star is born</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>T</td>
<td>Infinite Breakout: Notes from a Phillies of the Ballpark</td>
<td>Nii, Avel Abaran, Rep</td>
<td>2</td>
</tr>
</tbody>
</table>
The glitches...

You cannot select pick-up library until after you have created the request.

Sorting from the Patron Request screen is difficult.

You cannot see the patron’s information unless you add the patron barcode to the Other field.

Duplicate Holds.

No easy way to see who should be billed for the purchase request.

The Acquisition Request Module was not ported over completely in the Web Client before v3.2.

No way to easily see if requests are fulfilled and no way to easily clear old requests.

Links to requests from purchase orders do not work.
How it works in 3.2

Thanks to PaILS and Evergreen Indiana
# Easier to Navigate Patron Requests Screen

A screenshot of a website showing a table titled "Acquisition Patron Requests". The table displays columns for "User Barcode", "Title", "ISN", "Pickup Lib", "Place Hold", "Request Type", "Need Before Date/Time", and "Request Date/Time". Several records are shown with details for each column. The table also includes options to create a request, clear completed requests, and show canceled requests.
Questions?

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