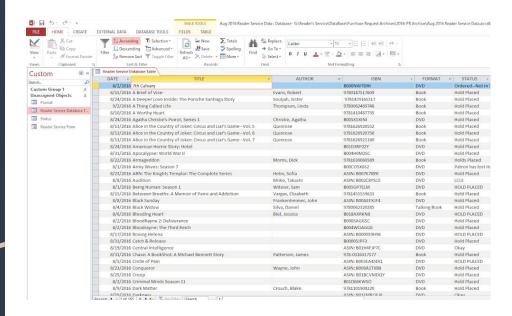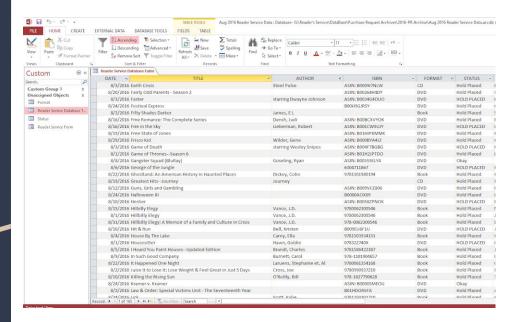# To Buy or Not To Buy?

Using Evergreen to create purchase requests

How we kept track:

Access Database!

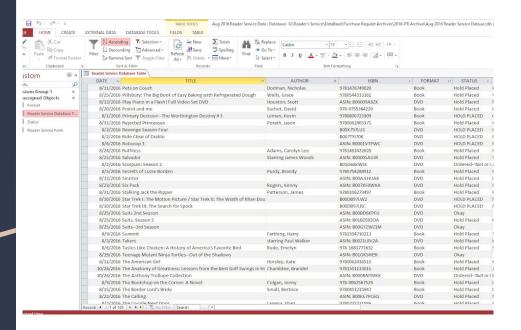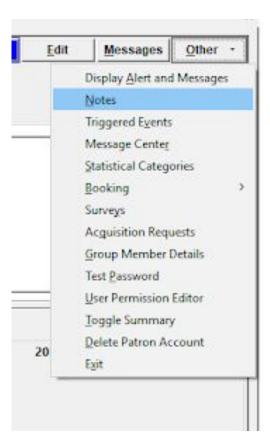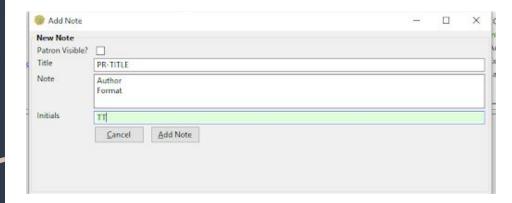# Yikes!

So many requests!

Did I put a request in for…?

We added notes.

Lots and lots of notes.

What next?
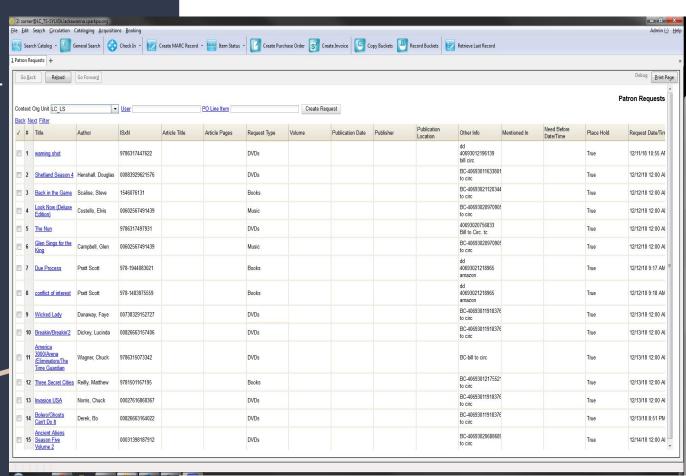
Compared the Access Database to Evergreen.

Added to Baker & Taylor Carts.

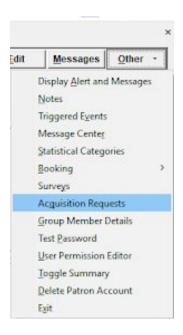Added notes to the database indicating status.

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

Admin (-) Help

File Edit Search Circulation Cataloging Acquisitions Booking

Search Catalog | General Search | Check In | Create MARC Record | Item Status | Create Purchase Order | Create Invoice | Copy Buckets | Record Buckets | Retrieve Last Record

1 Patron Requests +

Go Back Reload Go Forward

Debug Print Page

Patron Requests

Context Org Unit [LC_LS] User [____] PO Line Item [____] Create Request

Back Next Filter

✓	#	Title	Author	ISxN	Article Title	Article Pages	Request Type	Volume	Publication Date	Publisher	Publication Location	Other Info	Mentioned In	Need Before Date/Time	Place Hold	Request Date/Tim
☐	1	warning shot		9786317447622			DVDs					dd 40693012196139 bill circ			True	12/11/18 10:55 AM
☐	2	Shetland Season 4	Henshall, Douglas	00883929621576			DVDs					BC-40693011633801 to circ			True	12/12/18 12:00 AM
☐	3	Back in the Game	Scalise, Steve	1546076131			Books					BC-40693021120344 to circ			True	12/12/18 12:00 AM
☐	4	Look Now (Deluxe Edition)	Costello, Elvis	00602567491439			Music					BC-40693020970905 to circ			True	12/12/18 12:00 AM
☐	5	The Nun		9786317497931			DVDs					40693020756833 Bill to Circ. tc			True	12/12/18 12:00 AM
☐	6	Glen Sings for the King	Campbell, Glen	00602567491439			Music					BC-40693020970905 to circ			True	12/12/18 12:00 AM
☐	7	Due Process	Pratt Scott	978-1944083021			Books					dd 40693021218965 amazon			True	12/12/18 9:17 AM
☐	8	conflict of interest	Pratt Scott	978-1483975559			Books					dd 40693021218965 amazon			True	12/12/18 9:18 AM
☐	9	Wicked Lady	Dunaway, Faye	00738329152727			DVDs					BC-40693011918376 to circ			True	12/13/18 12:00 AM
☐	10	Breakin/Breakin'2	Dickey, Lucinda	00826663157406			DVDs					BC-40693011918376 to circ			True	12/13/18 12:00 AM
☐	11	America 3000/Arena /Eliminators/The Time Guardian	Wagner, Chuck	9786315073342			DVDs					BC-bill to circ			True	12/13/18 12:00 AM
☐	12	Three Secret Cities	Reilly, Matthew	9781501167195			Books					BC-40693012175521 to circ			True	12/13/18 12:00 AM
☐	13	Invasion USA	Norris, Chuck	00027616868367			DVDs					BC-40693011918376 to circ			True	12/13/18 12:00 AM
☐	14	Bolero/Ghosts Can't Do It	Derek, Bo	00826663164022			DVDs					BC-40693011918376 to circ			True	12/13/18 8:51 PM
☐	15	Ancient Aliens Season Five Volume 2		00031398187912			DVDs					BC-40693020688689 to circ			True	12/14/18 12:00 AM

How we made it faster, easier, and more efficient using Evergreen.

Context Org Unit LC_AL ▾ User 406930 PO Line Item _____ Create Request

Back Next Filter

✓	#	Title	Author	ISxN	Article Title	Article Pages	Request Type	Volume	Publication Date	Publisher	Publication Location

Create the request

View requests by patron

Patron Requests

Context Org Unit `LC_AL` ▾ User `40693020705541` PO Line Item `_____` [Create Request]

Back Next Filter

✓	#	Title	Author	ISxN	Article Title	Article Pages	Request Type	Volume	Publication Date	Publisher	Publication Location	Other Info	Mentioned In	Need Before Date/Time	Place Hold	Request Date/Time
☐	1	The Girl in the Spider's Web		9786317582040			DVDs					KM-40693020705541 Bill to Circ.			True	12/21/18 9:26 AM
☐	2	Venom		9786317514713			DVDs					KM-40693020705541 Bill to Circ.			True	12/21/18 9:24 AM
☐	3	Air Strike		9786317539778			DVDs					KM-40693020705541 - Bill to Circ.			True	12/21/18 9:23 AM
☐	4	Aquaman	Momoa, Jason	00883929624331			DVDs					BC-4069302070 to circ			True	1/23/19 12:00 AM
☐	5	Creed II	Jordan, Michael B.	00883929665525			DVDs					BC-4069302070 to circ			True	1/23/19 12:00 AM

Editing a request

View requests
From Acquisitions

The Full List

Patron Requests

Context Org Unit LC_AL ▾ | User | PO Line Item | Create Request

Back Next Filter

✓	#	Title	Author	ISxN	Article Title	Article Pages	Request Type	Volume	Publication Date	Publisher	Publication Location	Other Info	Mentioned In	Need Before Date/Time	Place Hold	Request Date/Time
☐	1	Lithuanian Cookbook For My Irish Wife	Sill Mike	9781977532558			Books					dd amazon			True	12/17/18 11:5 AM
☐	2	The Nun		9786317497931			DVDs					Bill to Circ. tc			True	12/12/18 12:0 AM
☐	3	Shetland Season 4	Henshall, Douglas	00883929621576			DVDs								True	12/12/18 12:0 AM
☐	4	Three Secret Cities	Reilly, Matthew	9781501167195			Books								True	12/13/18 12:0 AM
☐	5	Back in the Game	Scalise, Steve	1546076131			Books								True	12/12/18 12:0 AM
☐	6	Breakin/Breakin'	Dickey, Lucinda	00826663157406			DVDs								True	12/13/18 12:0 AM
☐	7	TrumpWorld	Star	9781545256886			Books								True	12/17/18 2:01 PM
☐	8	Glen Sings for the King	Campbell, Glen	00602567491439			Music								True	12/12/18 12:0 AM
☐	9	Wicked Lady	Dunaway, Faye	00738329152727			DVDs								True	12/13/18 12:0 AM
☐	10	Sexy Beast		B000QXDCLK			DVDs								True	12/17/18 2:04 PM
☐	11	Look Now (Deluxe Edition)	Costello, Elvis	00602567491439			Music								True	12/12/18 12:0 AM
☐	12	Fat Cat	Burns Rebecca	978-1947492219			Books								True	12/26/18 11:4 AM

2:20 PM

Sorting Requests and Building Selection Lists

New Brief Record

Add To Selection List   PR Book 4/16/19

Edition

Publication Date

Publisher

Identifier

Price   10.16

UPC

ISSN

ISBN   9781492660606

Pagination

Language of work

Author of work   Chupeco, Rin

Title of work   Shadow Glass

Save Record

Open in New Window

Selection list *PR Book 4/16/19*
Create date: 4/17/19
Last updated: 4/17/19
Selector: sorner
Entry Count: 13

--Actions--   ▾

Copies	Owning Branch	Copy Location	Collection Code	Fund	Circ Modifier	Distribution Formula	
	▾	▾		▾	▾	OR ▾	Apply to Selected

✓ Line Items   Expand All Items   Notes   Actions   Status   Estimated Price

Dutch Girl: Audrey Hepburn and World War II
Matzen, Robert 9781732273535
☐   Order Identifier ISBN ▾ 9781732273535 ▾
86166 | 0 | ⇒ link to catalog | ✎ worksheet | requests
Expand   Copies(0) Notes(0)   -- Actions -- ▾   New   15.79

Elements of Family Style: Elegant Spaces for Everyday Life
gates erin 9781501137303
☐   Order Identifier ISBN ▾ 9781501137303 ▾
86163 | 0 | ⇒ link to catalog | ✎ worksheet | requests
Expand   Copies(0) Notes(0)   -- Actions -- ▾   New   19.78

Elephant of Surprise
Landsdale Joe 9780316479875
☐   Order Identifier ISBN ▾ 9780316479875 ▾
86162 | 0 | ⇒ link to catalog | ✎ worksheet | requests
Expand   Copies(0) Notes(0)   -- Actions -- ▾   New   14.69

Home Hacks: Cleaning, Storage & Organizing, Decorating, Gardening, Entertaining, Clothing Care, Food & Cooking, Health & Safety, Appliances & Gadgets, Easy Repairs
Reader's Digest 9781621453710
☐   Order Identifier ISBN ▾ 9781621453710 ▾
86170 | 0 | ⇒ link to catalog | ✎ worksheet | requests
Expand   Copies(0) Notes(0)   -- Actions -- ▾   New   11.89

How The Dukes Stole Christmas
Dare, Tessa., et. al 9780062962416
☐   Order Identifier ISBN ▾ 9780062962416 ▾
86171 | 0 | ⇒ link to catalog | ✎ worksheet | requests
Expand   Copies(0) Notes(0)   -- Actions -- ▾   New   4.75

Inside the Empire: The True Power Behind the New York Yankees
Klapisch, Bob 9781328589354
☐   Order Identifier ISBN ▾ 9781328589354 ▾
86160 | 0 | ⇒ link to catalog | ✎ worksheet | requests
Expand   Copies(0) Notes(0)   -- Actions -- ▾   New   15.82

Then Into Your Purchase Order

And the Book is Ordered and the Hold is Placed

Record Summary

Title:	Vintage Living	**Edition:**		**TCN:**	10594082	**Created By:**	sorner
Author:	Richter, Bob	**Pub Date:**		**Database ID:**	10594082	**Last Edited By:**	sorner
Bib Call #:				**Record Owner:**		**Last Edited On:**	4/17/2019 11:41 AM

Start	Previous	Next	End	Back To Results (1 / 1)				Add Copies	Serials ▾	Mark for: ▾	Other Actions: ▾

OPAC View   MARC Edit   MARC View   View Holds   Monograph Parts   Holdings View   Conjoined Items

Set default view

Search the Catalog   Advanced Search   Browse the Catalog

Search: [_____]   **Type:** Keyword ▾   **Format:** All Formats ▾   **Library:** SPARK Library System ▾   Search   All Libraries

Recent searches

➕ **Vintage Living**
Richter, Bob (Author).

📖 Book

✔ Place Hold

Available copies

Current holds

- 0 of 1 copy available at SPARK Library System.

2 current holds with 0 total copies.

➕ Add to my list

🖨 Print / Email

✏ Disable Highlighting
Clear AddedContent Cache

Location	Call Number / Copy Notes	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Create Date	Holdable?	Status	Due Date
Albright Memorial Library	ACQ135571 (Text)	ACQ135571 view	Stacks	Book	None	04/17/2019	Copy hold / Volume hold	On Order	-

Duplicate holds

Hold Type	Title Proper (normalized)	Author (normalized)	Hold ID
T	Run away	Coben, Harlan 1962-	2
T	The Cornwalls are gone	Patterson, James 1947-	2
T	The First Lady	Patterson, James 1947-	2
T	One Good Deed	Baldacci, David	2
T	Redemption	Baldacci, David	2
T	The First Lady	Patterson, James 1947-	2
T	Redemption	Baldacci, David	2
T	Devotion : A Novel.	Stevens, Madeline.	2
T	Never Look Back.	Gaylin, Alison.	2
T	Vice		2
T	The happy prince		2
T	The matriarch : Barbara Bush and the making of an American dynasty	Page, Susan	2
T	The First Lady	Patterson, James 1947-	2
T	Boston legal. Season five		2
T	FIND ME.	ACIMAN, ANDR.	2
T	A dog's way home		2
T	A star is born		2
T	Infinite Baseball. Notes from a Philosopher at the Ballpark	Noe, Alva/ Abrams, Barry	2

4:26 PM

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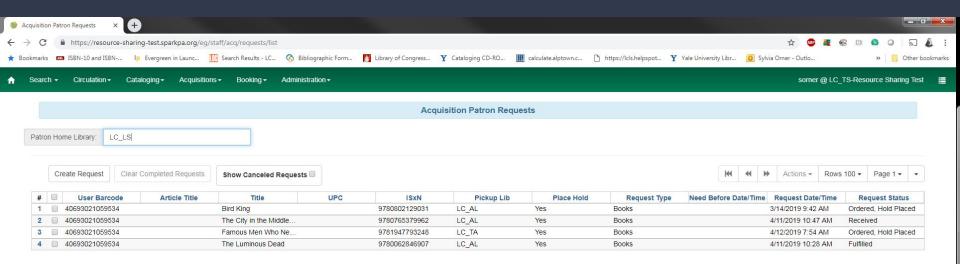
No way to easily see if requests are fulfilled and no way to easily clear old requests.

Links to requests from purchase orders do not work.

Thanks to PaILS and Evergreen Indiana

Easier to Navigate Patron Requests Screen

Questions?

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cthomas@albright.org

Sylvia Orner
sorner@albright.org