Purchasing Requests

Learn how to move requests to the Purchasing Requests queue and complete purchasing requests in Tipasa. The Purchase option allows you to track items you may wish to purchase, instead of borrowing via interlibrary loan. This feature allows you to input relevant data about the item you're purchasing, and tracks usage in OCLC Usage Statistics.

Note: Currently, the functionality allows tracking only, but future enhancements are planned.

Move requests to Purchasing Requests:

1. Patron initiated requests can appear in the Borrowing Requests > New for Review queue or, if the request matched an automation from the Automated Request Manager, the Purchasing Requests > Review for Purchase queue.

   Display requests from the New for Review queue:
   1. On the left navigation, click Borrowing Requests.
   2. Click New for Review.
   3. On the New for Review screen, click the request ID or Title to display the request.

   Display requests from Review for Purchase:
   1. On the left navigation, click Purchasing Requests.
   2. Click Review for Purchase.
   3. On the Review for Purchase screen, click the request ID or Title to display the request.

1. Click New for Review.
2. On the New for Review screen, click the request ID or Title to display the request.
3. Optional. Click the Purchase tab to review prices and links to vendor sites such as Get It Now if you subscribe to the service.
4. Click the Change Fulfillment Type button at the top of the request and select Purchase Request.
5. Complete any desired fields.
   Note: Vendor is mandatory.
6. Click Save.
7. A confirmation message appears and the request appears under Purchasing Requests > On Order.

The Purchase Request information displays at the top of the request details.
Complete Purchasing Requests

- When the item is received, manually Mark the request as received in the Tipasa interface.
  - Loan requests If you have the Loan available for pickup notification configured, the user will be notified that the item is ready for pickup. Please see Notification Types for more information.
    - My Account will update the request to Received by library.
    - The request will close.
  - Copy/Electronic requests - Add a URL Type and URL to the request prior to marking the item as received.
    - My Account will update to Available to view and will link to the requested item.
    - The request will close.
- If the purchase request is not received:
  - The Fulfillment Type of the request can be changed to an ILL request and submitted as a borrowing request.
  - Cancel the request as is appropriate.
Note: Requests that are On Order will be aged to Received? status after 21 system days. Please see Request Aging for more information.

Purchase Request status

The following table shows how the request status appears to staff in the Tipasa interface and to the patron in My Account.

<table>
<thead>
<tr>
<th>STAFF VIEW IN TIPASA</th>
<th>PATRON VIEW IN MY ACCOUNT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review for Purchase</td>
<td>Submitted</td>
<td>The request is in the Review for Purchase queue awaiting staff member evaluation.</td>
</tr>
<tr>
<td>On Order</td>
<td>Item requested for purchase</td>
<td>The requested item is on Order.</td>
</tr>
<tr>
<td>Received/Closed</td>
<td>Received by library</td>
<td>The request is updated to Received. Any configured notifications are sent to the patron.</td>
</tr>
<tr>
<td>Received/Closed</td>
<td>Available to view</td>
<td>A link to the requested item has been added to the Item URL field in Tipasa and the request is updated to Received.</td>
</tr>
</tbody>
</table>

Staff Notes

The Staff Notes tab allows you to keep notes that are viewable and searchable only by your library staff. Staff Notes can be added to active and closed requests. The number on the tab indicates how many Staff Notes currently exist for a particular request.

Edit and add Staff Notes

All staff users within an institution can add, edit and delete notes. Any staff member may edit any existing notes. The original author displays in the left column with the most recently-edited-by user name appearing just below the note.

Note: Only staff with the WorldShare ILL Admin role will be able to see the name of the author of the staff notes. Staff with the WorldShare ILL User role will see a date and time stamp for when the note was created/updated along with the name of the library.

The most recently added note will display at the top of the Staff Notes tab. Edited notes display based on the updated date and time.

Add a note
Note: There can be up to 500 notes per request.

1. From the request, select Note from the Actions panel.
2. Add the text of your note to the Add Staff Note text box.
   ◦ There is a 500 character limit for each note.
3. Click Add.
   ◦ To remove any text added to the Add Staff Note box, click Cancel.

Edit a Staff Note

1. From the request, click on the Staff Notes tab.
2. Next to the desired Staff Note, click on the button.
3. Select Edit.
4. Make the desired edits in the text box.
5. Click Update to save your changes.

A message appears confirming the note successfully saved.

Delete a Staff Note

Caution: Deleted notes are not retrievable.

1. From the request, click on the Staff Notes tab.
2. Next to the desired Staff Note, click on the drop-down.
3. Select Delete.
4. A message appears asking you to confirm deletion of the Staff Note.
5. Click Delete.

A message appears confirming the Staff Note has been deleted.

Usage Reports

The below WorldShare Interlibrary Loan reports include all types of purchase requests, including requests sent to WorldShare Acquisitions:

• Borrower Activity Overview Report
• WorldShare ILL Purchase Request Report

Please see WorldShare Interlibrary Loan reports for more information.