

Trove Collaborative Services

Trove Partners Resource Sharing – Learning Journey

Module 2 - Create

Transcript

00:00:05:06 - 00:00:08:22

Module Two

Create a Request

00:00:10:10 - 00:00:12:21

Hello and welcome to the Trove Partners

00:00:12:21 - 00:00:15:21

Resource Sharing video tutorial series.

00:00:18:11 - 00:00:22:02

The purpose of this series

is to provide training for the Trove

00:00:22:02 - 00:00:25:14

Partners

Resource Sharing platform, or TPRS

00:00:25:22 - 00:00:27:07

for short.

00:00:48:10 - 00:00:50:08

By the end of this video,

00:00:50:08 - 00:00:54:04

you will know how to create a request

00:00:54:04 - 00:00:58:00

for a resource you have found in the Trove
Partners Search.

00:00:58:17 - 00:01:01:17

Using TPRS,

00:01:02:02 - 00:01:04:18

this module focuses specifically

00:01:04:18 - 00:01:08:14

on requesting for the TPRS
reciprocal service.

00:01:10:01 - 00:01:12:23

Pay for peer requesting will be covered

00:01:12:23 - 00:01:15:23

in a later module.

00:01:15:23 - 00:01:20:00

Before watching this module,
we recommend watching module one.

00:01:20:04 - 00:01:21:04

Introduction.

00:01:25:05 - 00:01:28:05

Step one create

00:01:28:15 - 00:01:33:15

is the first of four steps
in the standard resource sharing request

00:01:33:15 - 00:01:37:05

lifecycle, and is from the perspective

00:01:37:05 - 00:01:40:05

of the requesting partners.

00:01:41:16 - 00:01:43:16

The workflow to create a request

00:01:43:16 - 00:01:46:16

that in the Trove Partners Search

00:01:46:22 - 00:01:49:22

where you can locate your desired resource

00:01:49:24 - 00:01:53:22

before moving to the Trove Partners
Resource Sharing

00:01:54:00 - 00:01:57:12

dashboard to initiate and manage
a request.

00:02:02:00 - 00:02:04:04

This is the beginning of the process

00:02:04:04 - 00:02:07:16

to create a request
starting in Trove Partners Search.

00:02:08:13 - 00:02:11:13

Having performed
a search and selected a resource

00:02:11:21 - 00:02:14:19

you want it to request. To arrive here

00:02:14:19 - 00:02:17:17

you will have logged into your Trove Partners

00:02:17:17 - 00:02:20:17

Search with your organisational login

00:02:20:19 - 00:02:23:16

and perform a search in the ANBD

00:02:23:16 - 00:02:26:16

to find your desired resource.

00:02:26:24 - 00:02:29:24

I am currently
on a full view of our record

00:02:30:14 - 00:02:34:19

and ready to commence
a request through TPRS.

00:02:36:04 - 00:02:37:15

On this screen

00:02:37:15 - 00:02:40:15

to initiate the process,

00:02:40:21 - 00:02:43:21

you can click on the Get this Item button

00:02:43:22 - 00:02:46:22

on the action toolbar, which will

00:02:47:15 - 00:02:50:15

take you to a pop up window

00:02:51:05 - 00:02:54:05

with multiple option to obtain the item,

00:02:54:23 - 00:02:57:23

navigate to the Resource Sharing tab.

00:03:00:14 - 00:03:03:14

And click on the request button.

00:03:05:05 - 00:03:06:02

At this point,

00:03:06:02 - 00:03:09:06

as move from Trove Partner Search to TPRS.

00:03:09:06 - 00:03:12:06

You are now in the TPRS platform

00:03:15:02 - 00:03:18:02

Now that I'm logged into TPRS,

00:03:18:09 - 00:03:23:15

I am presented with the request form,
which has been partially filled out

00:03:23:16 - 00:03:27:23

based on my search in Trove Partners
Search that led me here

00:03:29:07 - 00:03:32:07

and this was the record ID

00:03:33:20 - 00:03:36:20

that is unique to each record.

00:03:37:17 - 00:03:40:11

Specifically,

00:03:40:11 - 00:03:42:06

the fields in the requested

00:03:42:06 - 00:03:45:17

title sections such as title, author

00:03:46:07 - 00:03:50:11

and ISBN,

and the publication detail section

00:03:50:23 - 00:03:55:24

which includes publisher,
publication date and place of publication.

00:03:58:13 - 00:03:59:05

Our next

00:03:59:05 - 00:04:02:05

task is
to complete all the mandatory fields

00:04:02:07 - 00:04:05:10

that are currently highlighted
using the red asterisk.

00:04:10:11 - 00:04:12:04

I'm going to put

00:04:12:04 - 00:04:15:08

the requesting officer name here.

00:04:15:17 - 00:04:18:17

This would be the library staff detail.

00:04:19:11 - 00:04:22:11

You will then select your pickup location.

00:04:23:01 - 00:04:25:01

Please be reminded that

00:04:25:01 - 00:04:27:20

this will include multiple pickup location

00:04:27:20 - 00:04:32:06

within your organisation.

00:04:36:14 - 00:04:39:00

Then.

00:04:39:00 - 00:04:40:06

Staff delivery.

00:04:40:06 - 00:04:43:06

Email.

00:04:56:09 - 00:04:59:09

If you wish to pass on any note.

00:05:00:11 - 00:05:03:11

to the supplying library.

00:05:03:16 - 00:05:06:16

This is the field to fill that in.

00:05:07:22 - 00:05:10:22

And you would note

that there are some internal note as well.

00:05:11:16 - 00:05:14:16

This will not be passed

on to the supplying library.

00:05:16:11 - 00:05:18:08

The next step is to select

00:05:18:08 - 00:05:22:02

a service level for reciprocal services.

00:05:22:24 - 00:05:24:18

It's default to core.

00:05:24:18 - 00:05:27:06

But there are two other available service

00:05:27:06 - 00:05:30:06

level such as Rush and Express.

00:05:30:11 - 00:05:34:03

Next,

we'll choose the service type of a loan

00:05:34:03 - 00:05:34:21

or copy.

00:05:35:20 - 00:05:38:10

And if you're performing a copy request,

00:05:38:10 - 00:05:42:05

then you will want to complete

the partial detail section.

00:05:42:05 - 00:05:46:04

So supplier would know what pages
and chapter

00:05:46:11 - 00:05:50:12

to scan as well as a copy type
copyright type

00:05:51:16 - 00:05:54:14

available in the drop down box up here

00:05:54:14 - 00:05:57:14

which is currently default to section 50.

00:06:03:17 - 00:06:05:04

At this point,

00:06:05:04 - 00:06:08:04

I'm ready to submit the request.

00:06:09:11 - 00:06:13:04

I take a moment to review the form
and when I'm satisfied,

00:06:13:12 - 00:06:16:04

I simply click the Create Patron Request

00:06:16:04 - 00:06:19:04

button at the top right corner.

00:06:20:12 - 00:06:21:00

With the form

00:06:21:00 - 00:06:24:06

submitted, TPRS

is now start the process of finding me

00:06:24:06 - 00:06:27:07

a supplier based on my network membership

00:06:27:12 - 00:06:30:12

and their load balancing

00:06:30:14 - 00:06:33:02

so you can see which supplier

00:06:33:02 - 00:06:36:02

the request has gone to.

00:06:38:05 - 00:06:38:18

Lastly,

00:06:38:18 - 00:06:41:21

TPRS will display

my request in its current status.

00:06:45:24 - 00:06:48:24

It's expected to supply

00:06:48:24 - 00:06:52:03

and where I will go

to see detailed information

00:06:52:03 - 00:06:56:12

about the request

as well as perform actions.

00:06:56:24 - 00:07:00:00

You can see all available action

down in the screen

00:07:00:00 - 00:07:03:00

here.

00:07:06:18 - 00:07:08:13

In the top left,

00:07:08:13 - 00:07:11:00

you can see the designated request ID

00:07:11:00 - 00:07:14:00

and the title of the request.

00:07:16:05 - 00:07:18:08

The Request Information section

00:07:18:08 - 00:07:22:04

provides up to date information

on the status of my request.

00:07:23:05 - 00:07:26:21

I can see the status

which at this point in

00:07:26:21 - 00:07:29:21

time is expected to

00:07:30:17 - 00:07:32:24

supply,

00:07:32:24 - 00:07:35:12

and I can also see my institution

00:07:35:12 - 00:07:38:12

NUC and the requester

00:07:38:19 - 00:07:41:19

and currently assigned

00:07:42:23 - 00:07:45:01

supplier.

00:07:45:01 - 00:07:48:04

This information may change

as the request flows

00:07:48:04 - 00:07:51:10

through the rota

until the request is accepted.

00:07:54:15 - 00:07:57:24

I will also see information

that I have provided, such as.

00:07:57:24 - 00:08:00:24

Note.

00:08:03:00 - 00:08:05:13

And service type

00:08:05:13 - 00:08:06:16

and service level.

00:08:07:21 - 00:08:10:21

now, some fields will remain blank,

00:08:10:21 - 00:08:13:21

such as item, barcode, and code number

00:08:14:07 - 00:08:17:07

as they are completed at a later step.

00:08:17:13 - 00:08:20:13

Once a supplier

has committed to supply the request,

00:08:21:02 - 00:08:24:02

the last section is called actions,

00:08:24:09 - 00:08:28:17

and as the name suggests,

it depend on the stage of your request.

00:08:28:24 - 00:08:31:21

You can perform a number of actions here

00:08:31:21 - 00:08:35:01

as this is a new request,
the only action available

00:08:35:01 - 00:08:38:01

to me is to cancel,

00:08:38:04 - 00:08:41:04

which is this option right here.

00:08:41:11 - 00:08:43:05

If you wanted to see

00:08:43:05 - 00:08:47:07

further detail information
about the request, you can flip over

00:08:47:07 - 00:08:50:07

to the detail tabs.

00:08:50:16 - 00:08:52:02

Which provide information

00:08:52:02 - 00:08:55:20

such as requesting users

00:08:56:15 - 00:08:59:15

and an audit trail.

00:09:01:11 - 00:09:02:17

This will come in handy

00:09:02:17 - 00:09:06:09

to view

and track of all the state changes

00:09:06:19 - 00:09:09:19

throughout the request.

00:09:14:10 - 00:09:17:22

Noting that other fields on this page

will be completed

00:09:17:22 - 00:09:21:09

as the request progresses

through its life cycle.

00:09:22:17 - 00:09:23:08

In the top.

00:09:23:08 - 00:09:25:04

Right next to the blue.

00:09:25:04 - 00:09:27:16

Action button.

00:09:27:16 - 00:09:33:08

There's a little icon here

that looks like a messaging, icon that,

00:09:33:10 - 00:09:36:10

this is where you'll be able to find

00:09:36:11 - 00:09:39:11

all the messages
that are attached to the request.

00:09:39:11 - 00:09:42:11

This, including, condition

00:09:42:11 - 00:09:45:08

and ability to send direct messages

00:09:45:08 - 00:09:48:14

between the supplier and the requester

00:09:49:02 - 00:09:52:09

within the request lifecycle.

00:09:57:08 - 00:10:00:05

Closing this page

00:10:00:05 - 00:10:03:03

by clicking on the X button on the top

00:10:03:03 - 00:10:07:04

left will take me back to the ILL

Request app.

00:10:08:06 - 00:10:11:23

This is where I can see all of my request

00:10:13:01 - 00:10:16:07

with the date created
and when they are updated.

00:10:17:06 - 00:10:20:11

Scrolling to the right,
you can see the state, type

00:10:21:17 - 00:10:25:07

and more information on the request.

00:10:28:14 - 00:10:29:06

Clicking on

00:10:29:06 - 00:10:33:20

any of these transaction
will take you back to the

00:10:35:02 - 00:10:37:09

detailed display.

00:10:37:09 - 00:10:41:04

The ILL request app, and specifically,

00:10:41:04 - 00:10:44:23

this screen is where you will be managing

00:10:45:05 - 00:10:48:05

all of your outgoing request.

00:10:49:03 - 00:10:51:11

The search and filter on the left

hand side

00:10:51:11 - 00:10:54:19

are super useful,

and they are very easy to use.

00:10:55:05 - 00:11:00:00

So, for instance,

I can easily drill down to say request

00:11:01:02 - 00:11:04:02

in one or more state

00:11:04:13 - 00:11:07:06

all the available state,

00:11:07:06 - 00:11:10:06

or you can search by request ID.

00:11:13:03 - 00:11:15:04

or requester

00:11:15:04 - 00:11:18:04

or a title.

00:11:19:06 - 00:11:21:10

There's a handy tip

00:11:21:10 - 00:11:22:06

here.

00:11:22:06 - 00:11:26:11

Is that completed
request are hidden by default.

00:11:27:04 - 00:11:30:04

So if you're looking
for a historical record,

00:11:30:13 - 00:11:33:13

you will want to untick this

00:11:33:16 - 00:11:34:24

option.

00:11:34:24 - 00:11:37:07

The hide completed option which is

00:11:37:07 - 00:11:40:07

and take that box.

00:11:41:12 - 00:11:44:06

You will notice
that there are some color matches.

00:11:44:06 - 00:11:47:06

That looks like notification here.

00:11:56:08 - 00:11:57:13

The batches colors

00:11:57:13 - 00:12:00:22

represent

the type of messages that you've received.

00:12:01:10 - 00:12:04:03

The blue one means that,

00:12:04:03 - 00:12:07:19

there's an outstanding chat message.

00:12:11:21 - 00:12:12:10

And the red

00:12:12:10 - 00:12:15:24

one indicate that there's
an outstanding issue or an action

00:12:16:06 - 00:12:19:06

that is required for the request.

00:12:28:21 - 00:12:31:21

Finally,

if your request cannot find a supplier,

00:12:32:07 - 00:12:35:07

it will go into the status end of rota to

00:12:36:16 - 00:12:38:02

such as this transaction.

00:12:38:02 - 00:12:41:17

Here, and it will become completed.

00:12:44:14 - 00:12:46:17

So if I click into that transaction,

00:12:46:17 - 00:12:49:17

you can see that

it has gone to end of rota.

00:12:52:18 - 00:12:53:11

When a request

00:12:53:11 - 00:12:57:14

go to end of rota,

you will receive a notification email.

00:12:58:07 - 00:13:01:07

This will prompt you

to submit another request.

00:13:01:21 - 00:13:04:17

You have now completed module two,

00:13:05:23 - 00:13:09:07

creating a request through Trove Partners
Resource Sharing.

00:13:09:20 - 00:13:12:03

Thank you for watching.

00:13:12:03 - 00:13:16:05

You can find more training and information

in the Trove Partners Learning Hub.