

## Trove Collaborative Services

### Trove Partners Resource Sharing – Learning Journey

#### Module 3 - Action

##### Transcript

00:00:02:00 - 00:00:03:17

Module three

00:00:03:17 - 00:00:06:00

Action a request.

00:00:06:00 - 00:00:08:18

Hello and welcome to the Trove Partners  
Resource

00:00:08:18 - 00:00:11:18

Sharing video tutorial series.

00:00:30:20 - 00:00:31:22

This module covers

00:00:31:22 - 00:00:35:09

step two of the standard request  
lifecycle.

00:00:35:18 - 00:00:38:24

The process to action  
to request through the Trove Partners

00:00:38:24 - 00:00:42:08

Resource

Sharing platform is done primarily

00:00:42:17 - 00:00:46:09

from the perspective

of the supplying Trove partners,

00:00:47:20 - 00:00:51:11

and it is the second of the full steps

00:00:51:11 - 00:00:55:10

in the standard of resource

sharing request lifecycle.

00:00:56:02 - 00:00:59:13

The workflow

to action a request from another library

00:00:59:18 - 00:01:05:09

is performed in your Trove Partners Resource

Sharing dashboard, where you can opt

00:01:05:09 - 00:01:09:19

to supply or not to supply the resource

that has been requested.

00:01:10:21 - 00:01:13:10

This is where a partner can choose

to either

00:01:13:10 - 00:01:17:09

supply

or not supply a newly requested resource.

00:01:17:20 - 00:01:22:07

If you choose to supply, you will  
then proceed through the workflow

00:01:22:07 - 00:01:27:10

until a resource or copy has been sent  
to the requesting library.

00:01:28:11 - 00:01:30:13

Trove Partners will receive emails

00:01:30:13 - 00:01:33:17

notifying them  
that new request for supply

00:01:33:17 - 00:01:36:17

are awaiting their review.

00:01:39:19 - 00:01:40:11

To review

00:01:40:11 - 00:01:43:24

a request,  
you need to visit your dashboard.

00:01:44:20 - 00:01:47:11

When you have received a new request,

00:01:47:11 - 00:01:51:14

an email will be sent to you  
noting that a request has been received

00:01:51:24 - 00:01:54:24

which requires your library  
to take action.

00:01:55:20 - 00:01:57:21

In this email,

00:01:57:21 - 00:02:01:08

there will be a link  
to take you to your TPRS dashboard.

00:02:02:01 - 00:02:05:24

You can either use this link  
to navigate to your TPRS dashboard,

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

or have this URL

00:02:11:17 - 00:02:14:24

bookmarked as your preferred way  
in your preferred web browser.

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

Once you logged into your TPRS dashboard,

00:02:20:24 - 00:02:23:24

with your individual sign on,

00:02:24:05 - 00:02:26:08

you can open

00:02:26:08 - 00:02:28:20

the ILL supply app by clicking on

00:02:28:20 - 00:02:31:20

the pink ILL supply button

00:02:31:23 - 00:02:34:23

on the top of the dashboard.

00:02:35:16 - 00:02:38:21

The ILL supply app is used to manage

00:02:38:24 - 00:02:42:05

all incoming requests to supply.

00:02:43:20 - 00:02:46:17

ILL supply is very similar to the

00:02:46:17 - 00:02:50:02

ILL request app covered in module two

00:02:51:06 - 00:02:53:16

with search and filter on the left

00:02:53:16 - 00:02:56:22

hand side, allowing you to easily drill

00:02:56:22 - 00:02:59:22

down to requests in one or more states,

00:03:00:09 - 00:03:03:09

or to search by request ID.

00:03:10:08 - 00:03:13:07

You can search by location as well,

00:03:13:07 - 00:03:16:07

and what states

the transaction is currently in.

00:03:22:23 - 00:03:25:23

And just like the ILL request app,

00:03:25:24 - 00:03:29:04

ILL supply also default to hide

00:03:29:04 - 00:03:32:04

or completed request.

00:03:33:15 - 00:03:37:23

You can unhide this option

to see or complete a transaction.

00:03:42:15 - 00:03:45:11

Now before accessing the new request,

00:03:45:11 - 00:03:48:02

you can see two in progress

00:03:48:02 - 00:03:52:04

requests have the alerted

00:03:52:04 - 00:03:56:00

icon based on the red and blue batches  
being displayed.

00:03:57:21 - 00:04:01:14

The red icon indicates  
an outstanding issue with the request,

00:04:02:05 - 00:04:05:05

and in this instance is because

00:04:05:06 - 00:04:09:07

the requester has canceled the request,  
which required

00:04:09:23 - 00:04:12:23

my acceptance.

00:04:18:18 - 00:04:21:18

And then go back to the menu.

00:04:22:07 - 00:04:24:21

The blue batch

00:04:24:21 - 00:04:26:14

tells me that I have received

00:04:26:14 - 00:04:29:14

a new message from the requester.

00:04:31:03 - 00:04:33:17

You can find the message in the chat

00:04:33:17 - 00:04:36:17

icon on the right corner.

00:04:49:05 - 00:04:51:14

Now back to the task at hand,

00:04:51:14 - 00:04:55:10

and I can see that new request to supply  
has been assigned to my library.

00:04:57:00 - 00:04:58:15

I know that

00:04:58:15 - 00:05:01:15

this says it is in the state of New.

00:05:05:16 - 00:05:09:09

So I'll go ahead and click  
on it to see more details.

00:05:17:01 - 00:05:18:13

In here,

00:05:18:13 - 00:05:21:13

I can see the request ID,

00:05:22:03 - 00:05:25:02

which flow from the requester

00:05:25:02 - 00:05:28:02

and the requesting NUC,

00:05:29:12 - 00:05:32:12

the service level,

00:05:34:02 - 00:05:36:06

and the type of request

00:05:36:06 - 00:05:40:23

is a loan.

00:05:43:07 - 00:05:44:05

And if there was any

00:05:44:05 - 00:05:47:05

note entered in by the requester,

00:05:47:10 - 00:05:50:10

that will flow through as well.

00:05:50:22 - 00:05:54:14

If this is a copy request,

I will also see details

00:05:54:14 - 00:05:58:10

on what section of pages I need to supply.

00:06:00:07 - 00:06:02:16

If this information are missed

00:06:02:16 - 00:06:06:00

within a copy request,  
you can always use the chat function

00:06:06:15 - 00:06:09:16

to request more information  
from the requesting

00:06:09:16 - 00:06:12:16

library.

00:06:17:00 - 00:06:18:15

At the bottom of the screen,

00:06:18:15 - 00:06:21:13

I have my available action

00:06:21:13 - 00:06:24:13

at this step of the workflow.

00:06:27:09 - 00:06:31:06

So in a request, as this a new state,

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

I can respond either by will supply,

00:06:36:23 - 00:06:40:20

cannot supply or conditional supply.

00:06:43:14 - 00:06:43:23

Once you

00:06:43:23 - 00:06:46:23

are ready  
to respond and supply this resource,

00:06:47:17 - 00:06:50:01

click on the button.

00:06:50:01 - 00:06:53:01

The action say will supply.

00:06:55:20 - 00:06:58:22

I will now need to provide  
some local resource details

00:06:59:04 - 00:07:02:23

including a call number, location  
and shelving location.

00:07:04:00 - 00:07:08:01

These details are configured  
based on your local information

00:07:09:11 - 00:07:12:11

and optionally, I can also add a note.

00:07:24:05 - 00:07:26:24

Once completed,

00:07:26:24 - 00:07:29:04

click on

00:07:29:04 - 00:07:31:16

the respond will supply

00:07:31:16 - 00:07:34:16

in the request status will change

00:07:36:06 - 00:07:40:03

from new to awaiting pull slip

00:07:40:17 - 00:07:43:17

printing.

00:07:46:23 - 00:07:49:23

You can see the status is on here.

00:07:56:13 - 00:07:57:06

Yeah.

00:07:57:06 - 00:08:01:02

Now let's take a quick  
look on the requester side.

00:08:01:20 - 00:08:04:22

So I'm going to go back  
to the requester side.

00:08:04:22 - 00:08:08:20

And on the ILL request tab.

00:08:09:06 - 00:08:14:19

This transaction status  
has now changed to expect

00:08:14:19 - 00:08:17:19

to supply.

00:08:24:07 - 00:08:24:22

Let's go back

00:08:24:22 - 00:08:27:24

to the supplying side of this request.

00:08:35:15 - 00:08:38:01

As you can see on the screen,

00:08:38:01 - 00:08:41:01

I will now have new action  
available to me.

00:08:41:08 - 00:08:44:08

I can print a pull slip

00:08:45:05 - 00:08:48:05

which will pop up a printing view.

00:08:51:17 - 00:08:54:17

The pull slip include the request ID.

00:08:56:22 - 00:08:59:22

Request ID.

00:09:02:07 - 00:09:04:08

And a handy barcode

00:09:04:08 - 00:09:09:04

that can be used by both the supplier  
and the requester to perform action,

00:09:09:20 - 00:09:13:00

as a resource transition  
through the request lifecycle.

00:09:14:22 - 00:09:17:15

It also includes the title,

00:09:17:15 - 00:09:20:10

author's details, and any notes provided

00:09:20:10 - 00:09:23:10

by the requester.

00:09:25:24 - 00:09:28:20

Once printed, I can mark the pull slip

00:09:28:20 - 00:09:31:12

as print using the button on the top

00:09:31:12 - 00:09:34:12

right corner.

00:09:35:19 - 00:09:38:22

Or alternatively,

this button is also available

00:09:39:12 - 00:09:42:12

in the action option.

00:09:49:08 - 00:09:51:06

During this step,

00:09:51:06 - 00:09:54:05

if I find an issue

in supplying this request.

00:09:54:05 - 00:09:58:10

For instance,

if an item cannot be located for supply,

00:09:59:01 - 00:10:04:11

I can also click on the action

of cannot supply and it will move

00:10:04:11 - 00:10:08:20

the request back to the rota

and look for the next supplier.

00:10:19:11 - 00:10:22:11

I printed the pull slip,

00:10:23:10 - 00:10:24:18

which moved the request

00:10:24:18 - 00:10:29:16

to the status of searching,  
indicating that the library

00:10:29:16 - 00:10:32:16

is sourcing for the item to supply.

00:10:38:20 - 00:10:40:04

At this point,

00:10:40:04 - 00:10:42:23

depending on the request type,

00:10:42:23 - 00:10:45:23

I will be presented  
with different options.

00:10:46:03 - 00:10:49:05

One example of this  
is currently a loan request,

00:10:51:03 - 00:10:53:14

so for a loan request

00:10:53:14 - 00:10:56:14

simply

I just need to scan the item barcode.

00:11:04:20 - 00:11:08:16

Alternatively, I can print the pull slip,

00:11:09:17 - 00:11:12:17

add a loan condition.

00:11:15:15 - 00:11:19:04

Or if you

00:11:19:05 - 00:11:22:05

If the request cover multiple volumes,

00:11:22:17 - 00:11:25:17

you can enter multiple barcodes.

00:11:27:16 - 00:11:30:16

Add the volumes into here.

00:11:33:11 - 00:11:36:11

Once I have scanned the item barcode,

00:11:38:17 - 00:11:42:13

the status will move

to a waiting shipping.

00:11:50:05 - 00:11:53:05

When I'm ready to ship the item.

00:11:54:18 - 00:11:56:09

I can either enter

00:11:56:09 - 00:12:01:17

the request ID into here  
by scanning the barcode,

00:12:02:10 - 00:12:05:10

or you can also

00:12:05:13 - 00:12:09:24

is the action  
marked request shipped as well?

00:12:13:09 - 00:12:16:20

And the request now moved to shipped.

00:12:23:11 - 00:12:26:11

If this is a copy request.

00:12:27:06 - 00:12:28:23

I will show you an example

00:12:28:23 - 00:12:31:23

of a copy request.

00:12:37:02 - 00:12:38:14

You can see there are different

00:12:38:14 - 00:12:41:14

available actions.

00:12:42:18 - 00:12:44:23

I will need to provide access

00:12:44:23 - 00:12:47:23

to a digitised file.

00:12:51:06 - 00:12:54:06

You can either enter a URL

00:12:54:14 - 00:12:57:02

in the provided field and click

00:12:57:02 - 00:13:00:02

Fill Request.

00:13:01:08 - 00:13:04:02

Alternatively, I can upload a file

00:13:04:02 - 00:13:08:01

by clicking the upload file

to Fill Request button

00:13:09:06 - 00:13:12:06

available at the actions.

00:13:13:09 - 00:13:16:09

This will open a pop up window

00:13:17:16 - 00:13:21:12

where you can either drop a file

into this window.

00:13:21:12 - 00:13:24:21

Here, or click on the blue button

00:13:26:03 - 00:13:29:03

to select a file.

00:13:37:08 - 00:13:40:08

One either of these action is perform.

00:13:40:08 - 00:13:43:08

The request status will change a document  
delivered

00:13:43:23 - 00:13:46:23

which completes and close the request.

00:13:50:15 - 00:13:52:20

Let's have a look at this transaction.

00:13:52:20 - 00:13:54:06

On the request side.

00:14:06:15 - 00:14:09:15

The request  
side will receive a notification

00:14:09:21 - 00:14:12:21

to notify them  
that the document is now available.

00:14:15:02 - 00:14:16:22

And you can see that the status has now

00:14:16:22 - 00:14:19:22

moved to a document delivered.

00:14:22:15 - 00:14:25:15

And the URLs will be available

00:14:26:13 - 00:14:28:12

in the detailed tab

00:14:28:12 - 00:14:31:12

attached to the transaction as well.

00:14:32:14 - 00:14:35:13

URLs will also come to the requester

00:14:35:13 - 00:14:38:13

in the notification email.

00:14:40:17 - 00:14:43:16

You have now completed module three

00:14:43:16 - 00:14:46:17

Actioning a request through Trove Partner  
Resource Sharing.

00:14:47:07 - 00:14:49:05

Thank you for watching.

00:14:49:05 - 00:14:53:04

You can find more training and information

in the Trove Partners Learning Hub.