



Software User Manual

Release date: March 24th, 2023

HERMES Strengthening digital resource sharing during COVID and beyond
STRATEGIC PARTNERSHIPS FOR HIGHER EDUCATION
KA226-HED DIGITAL EDUCATION READINESS
Project number 2020-1-IT02-KA226-HE-095624 - CUP B65F21000120006



Co-funded by the
Erasmus+ Programme
of the European Union



NOTE

This manual is expressly dedicated to the librarians whose libraries adopt the TALARIA software. This user manual has been realized in the framework of the HERMES project, which aims at providing educational institutions high quality, fast and free access to knowledge by building capacity to implement and share a comprehensive vision and widespread competencies on resource sharing accompanied by an open source system to support effective access to knowledge for all.


HERMES is co-funded by the Erasmus+ Programme of the European Union. This publication reflects the views only of the authors, and the European Commission cannot be held responsible for any use which may be made of the information contained therein.

CREDITS

TALARIA Software User Manual: March 2023

Authored by **Silvana Mangiaracina, Alessandro Tugnoli, Debora Mazza** and **Rabih Kahaleh** (National Research Council, Bologna Dario Nobili Library).

Editing, correction and check by **Gabriela Carrara, Silvana Mangiaracina e Debora Mazza** (National Research Council, Bologna Dario Nobili Library)

 - 2023 Biblioteca Dario Nobili del CNR di Bologna.

This document was produced using the free software LaTeX, written by Leslie Lamport, maintained and developed by the LaTeX3 Project, and distributed under the LaTeX Project Public License (LPPL).

Author of conversion to \LaTeX : **Gabriela Carrara**

PREFACE

TALARIA¹ is a new open-source resource-sharing management software, which has been developed under the frame of the European project HERMES Strengthening Digital Resource Sharing during COVID and beyond.²

HERMES has produced, besides the new software, a new publication³, open educational materials and free training courses⁴ for librarians, university students and researchers to provide high quality, fast and free access to knowledge through the development of specific skills on the topic of digital resource sharing.

HERMES was conceived to reinforce the RSCVD (Resource Sharing during COVID-19) initiative of the IFLA Document Delivery & Resource Sharing Section. RSCVD is based on the voluntary contribution of a hundred librarians around the world, who worked with the tools available at that moment in order to share documents held in their libraries with the world academic community.

It was the first experiment in free digital resource sharing worldwide.

HERMES project aim is to develop a new resource sharing management software suitable to support the RSCVD initiative, as well as any other resource sharing library communities in the world and to bridge the gap among existing resource sharing communities and consortia in the world.

During the design and development process, the exchange with RSCVD volunteers and librarians has been very important: they have been involved in testing the software to collect feedback, make improvements, detect and correct bugs in order to build reliable, user-oriented software. Additionally, along with the release of the new software, distance training activities have been organised and software guidelines and User's tasks has been published to support librarians in their daily resource sharing workflow.

All screenshots presented in this user manual refer to a specific instance of TALARIA that is operational for the RSCVD international community of libraries.

¹The Talaria of Mercury (Latin: talaria or The Winged Sandals of Hermes Ancient Greek: πτενοπέδιλος, ptenopédilos or πτερόεντα πέδιλα pteróenta pédila) are winged sandals, a symbol of the Greek messenger god Hermes. Source: <https://en.wikipedia.org/wiki/Talaria>

²To learn more about HERMES project, see the website: <https://www.hermes-eplus.eu/>

³Document Delivery and Resource Sharing: Global Perspectives, edited by P. Collins, IFLA Professional Reports series, *in press*.

⁴<https://www.youtube.com/@hermesproject1949/videos>

Contents

1	Introduction: TALARIA main features	7
1.1	Software technology	7
1.2	Multilingual support	7
1.3	User interface	7
1.4	Customisable configuration	7
1.5	New reference creation and Open Access integration	8
1.6	User roles	8
2	TALARIA Home	10
2.1	Search for a Reference	10
2.2	Sign Up	11
2.2.1	Library Registration	12
2.3	LOGIN	17
3	User dashboards and user profile panel	20
4	My Library	21
4.1	Status	21
4.2	Library Profile	21
4.3	Tags	21
5	Borrowing	22
5.1	New Request	22
5.1.1	Open Access integration	24
5.2	Pending Requests	25
5.2.1	New Request processing	26
5.2.2	Requested request processing	27
5.2.3	Received/Fulfilled request processing	30
5.2.4	Not received request processing	31
5.3	Archive	31
5.4	Table of Borrowing actions and icons	32
6	Lending	34
6.1	Pending Requests	34
6.1.1	Fulfill process	35
6.1.2	Not fulfillment process	37
6.1.3	Cancel requested	38
6.2	Orphaned Requests	39
6.3	Archive	40
6.4	Table of Lending actions and icons	41

List of Figures

1	RSCVD home page	10
2	Search for a reference: OA version found	10
3	Search for a reference: OA version NOT found	11
4	Login/SignUp dialog box	11
5	SignUp. Create your profile	12
6	Library registration: location and profile section	13
7	Library registration: Contacts and Institution	14
8	Library registration: Institution not present	14
9	Library registration: Library identifiers	15
10	Library registration: Do you want to upgrade to Full RS profile?	16
11	Library registration: library OPAC (only for libraries with Full RS profile)	17
12	Library registration: Review summary report and Submit	17
13	Login dialog box	18
14	My library: Status new	18
15	My library: Status Active. All menus are displayed	19
16	User profile panel. In this figure the user "Debora" manages two libraries. She has selected Biblioteca Dario Nobili and visualizes the corresponding dashboard.	20
17	My library. Status: Active. Library registered with "Basic" profile may upgrade to "Full" profile	21
18	My library. Tags management	22
19	Borrowing: New request	22
20	Borrowing: Request Form filled manually or automatically via an OpenURL	23
21	Borrowing: New request detail, reference short display	23
22	Borrowing: New request detail, reference full display	24
23	Borrowing: New request inserted where an OA version is found	25
24	Request detail. OA Link is visible in the Identifiers group (ISSN or ISBN, PMID)	25
25	Borrowing. Pending Requests list	26
26	Borrowing. Pending Requests list. Actions on a "new" request	26
27	Borrowing: Choose one lender library or ALL libraries to request from	27
28	Borrowing: Pending Requests list. Request sent to a single library	27
29	Borrowing: Pending Requests list. Request sent to ALL libraries	28
30	Borrowing: Pending Requests list. A request sent to ALL libraries has been accepted and, consequently, the name of the accepting library is displayed	28
31	Borrowing: Cancel requested	28
32	Borrowing: Received request: an electronic document is available for download	29
33	Borrowing: Received request: an electronic document is available via URL	29
34	Borrowing: Not fulfilled request	29
35	Borrowing: Received request. Check the document received	30
36	Borrowing: Received request has been verified. Two actions are possible: archive or trash it	30
37	Borrowing: Received request has been verified and then trashed. It is possible to repeat the request (or archive it)	30
38	Borrowing: Fulfilled request via mail or fax or Article Exchange (A.E.) may be set to received upon its arrival	31
39	Borrowing: Not received request may be reiterated to a new library or archived	31
40	Lending: Pending requests	34
41	Lending: Request fulfillment	35
42	Lending: Select the delivery methods among: File, Mail, Fax, URL, Article Exchange (A.E.) or Other	35
43	Lending: Delivery method: File	36
44	Lending: Delivery method: URL	37
45	Lending: Cannot fulfill	38
46	Lending: Cannot fulfill reasons	38
47	Lending: Cancel requested	39
48	Lending: Orphaned requests	39

49 Lending: An orphaned request that has been accepted to supply moves to own pending requests. 40

List of Tables

1	Institution types	13
2	Library identifier types and description	15
3	Library disciplinary sectors	16
4	Borrowing: Action buttons	32
5	Borrowing: Information icons	33
6	Lending: Action buttons	41
7	Lending: Information icons	41

1 Introduction: TALARIA main features

TALARIA can be freely used by library communities in the world, whose common purpose is to ensure high quality and free access to knowledge through resource sharing and document delivery. TALARIA is being designed as a modular and customisable system: more modules will be added in the future releases of the software. TALARIA's first release contains the "core" resource sharing modules, which are described in the following chapters 5 and 6 (Borrowing and Lending), while additional modules will be added in the future.

1.1 Software technology

The new TALARIA software architecture is built with free and open-source technologies as much as possible. The web server is Nginx to ensure high performance.

The front-end was implemented in HTML, CSS and ES6 JavaScript using the ReactJS framework for a dynamic experience.

The backend was developed in PHP using the open-source Laravel framework and uses a MySQL DBMS. All business logic is made available to the front-end through APIs.

1.2 Multilingual support

TALARIA provides multilingual support. The software has been developed in English and will be initially translated into Spanish and Italian, to demonstrate that any other language not yet present can be added. The goal is to incorporate as many languages as possible to facilitate the use by librarians worldwide. It is possible to switch from a language to another clicking in the footer.

1.3 User interface

Technology has become an integrated part of our daily lives and access to scientific information must be ensured at any time with good performance, even through portable devices. For this reason, TALARIA has been developed as a Progressive Web App (PWA): to ensure a responsive, fast, secure web browsing experience on different platforms. PWA technology combines the possibilities offered by web pages with the advantages of mobile use, offering the same user experience as native apps on mobile devices.

The user interface is user-friendly and based on visual communication. It is designed to be compact and it synthesises actions and information into minimum work environments through icons. These icons allow the recognition and the immediate use of the corresponding action and allow the total control of the operations.

1.4 Customisable configuration

TALARIA is designed to be a flexible platform to respond to the needs and policies of different library resource sharing (RS) communities. For this reason, it enables different levels of customisation. Each RS community can decide what features can be activated or not in the initial TALARIA setup. The main customisable features are:

- Graphical identity, such as logo and colour palette, to reflect the visual identity of individual RS communities;
- Authentication systems. Three different authentication systems that can be enabled will be offered:
 - the traditional authentication with the e-mail address and the password chosen during sign-up;
 - the federated authentication based on SAML language. In Italy, for example, it has been planned to join the IDEM⁵ national federation for universities and research institutions for authentication and authorisation and SPID, the national authentication infrastructure for citizens to access all the public services. Of course, TALARIA will offer the possibility to add different federated systems depending on the needs of the library communities.
 - authentication via social network accounts, such as Facebook or Google.

⁵Italian IDEM federation website <https://www.idem.garr.it/en/>

- Resource sharing profiles. TALARIA gives the possibility to build peer-to-peer communities where each library is a borrower and lender at the same time, or communities where libraries may have different RS profiles: "Basic" for a borrower only, or "Full" where a library can be a borrower and lender;
- Community policies on recovering the ILL costs: the document exchange among libraries can be set up to be totally free of charge (as in the RSCVD community as it was started), free of charge with an imbalance threshold (as in the Italian NILDE community ⁶, or with a fixed unit cost, for example using IFLA vouchers;
- End-users management: each library community can decide to enable Patron requests or not;
- The connection to different union catalogues to search for library holdings.

1.5 New reference creation and Open Access integration

In order to minimise errors during the manual input of the bibliographic metadata of a bibliographic reference, TALARIA offers the possibility to look for a reference using one of its unique identifiers (DOI, PMID or ISBN) and, if it is found, automatically import all the bibliographic metadata. Another option is to import a new reference through the OpenURL protocol, using bibliographic databases or publishers' websites as the OpenURL sources. Finally, the possibility of entering all bibliographic metadata manually using the "New Reference" form is always available. The open access integration is one of the most relevant features of TALARIA. This is made possible by integration with the OA button API (<https://openaccessbutton.org/>) developed by OA.Works. The OA button can check if a resource is available in open access and if there exists an archived version in a public repository. If the resource is available, the link/PDF resource is directly accessible at the TALARIA user interface.

1.6 User roles

TALARIA introduces the user roles that allow different levels of control over actions.

The Community manager is in charge of managing new libraries: when a new library requests to be part of the community (see paragraph 2.2.1), the Community manager checks the validity of data, checks if there are duplicates or not and then enables the new library to start to operate exchanging requests and documents.

Library Operators manage the resource sharing workflow and they can be authorised for multiple roles at the same time, in the same or in multiple libraries, depending on their tasks. The Library Operators' roles are:

1. The Library Manager. This role is acquired after user registration if the user decides to register a new library in the system (i.e. in the RS community). When a user registers a new library, his/her account is created or associated with that library with the role of Library Manager. The Library Manager has control of all operations and is the one who manages his/her library inside the community. He/she can invite, activate, deactivate and remove all the other library operators (including another Library Manager);
2. The Borrowing Operator. The Borrowing Operator only manages the submissions and management of requests to other libraries;
3. The Lending Operator. The Lending Operator only handles the supply of materials requested by other libraries.

If in the TALARIA initial setup the End-users management has been enabled, it means that the community decides to manage Patron requests, then two more Library Operators roles and the Patron User role are available:

⁶In the NILDE RS community, each library commits itself "to send documents free of charge, unless there is a strong imbalance between the number of documents requested and supplied, compensations can be obtained at the end of the year" Source: NILDE Rules and Regulations, https://nildeworld.bo.cnr.it/en/content/rules_and_regulations#sotto1.1

4. The User Management Operator. The User Management Operator is the one who administers the library's Patron registration requests;
5. The Delivery Operator. The Delivery Operator is in charge of the management of the Pick-up Desks, printing and delivering requested documents that cannot be digitally delivered to the library's patrons.
6. The Patron User. To become a Patron User, the user must be associated with a library already present in the community. Patron Users can manage their bibliography and request references, edit their personal information, and they can associate with, meaning that they may belong to, one or more libraries.

2 TALARIA Home

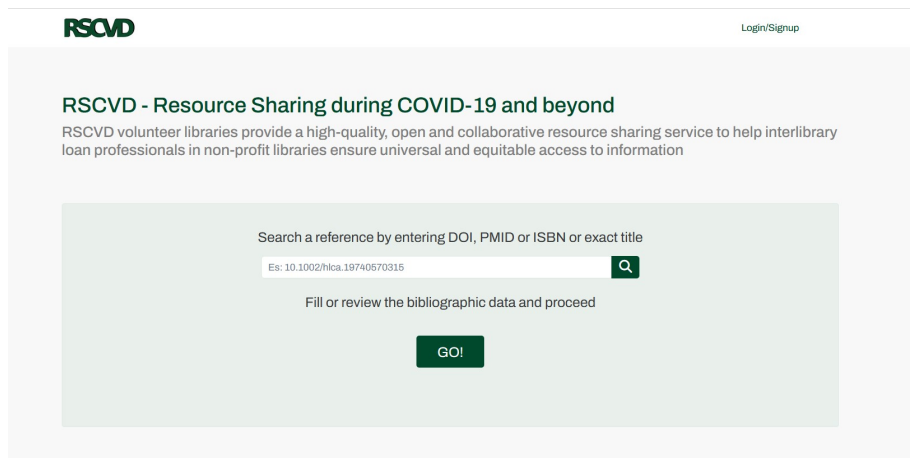


Figure 1: RSCVD home page

The standard TALARIA homepage displays three sections:

1. Title and welcome message presenting the resource sharing community
2. Box where it will be possible to search for a reference or to fill manually the bibliographic metadata
3. Login or Signup (page top right)

It is possible to switch from a language to another clicking in the footer. Now English/Italian is available. Figure 1 shows the TALARIA Homepage customized for the RSCVD community; it has the logo, name, mission of this specific community.

2.1 Search for a Reference

The search box behaviour is the same as described in paragraph "5.1 New Request". A new reference can be either searched by the exact title or identifier (DOI, PMID or ISBN) and automatically imported. Either if the reference has been found or not, it will be possible to create a new request using the button "Go!", importing the full bibliographic reference or filling it manually. If an OA version is found it will be immediately displayed. After clicking on "Go!" it will be necessary to Login to continue.

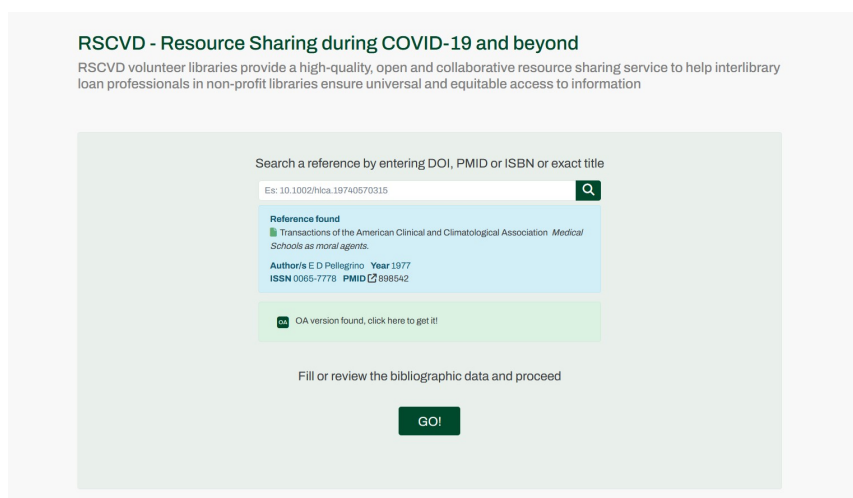


Figure 2: Search for a reference: OA version found

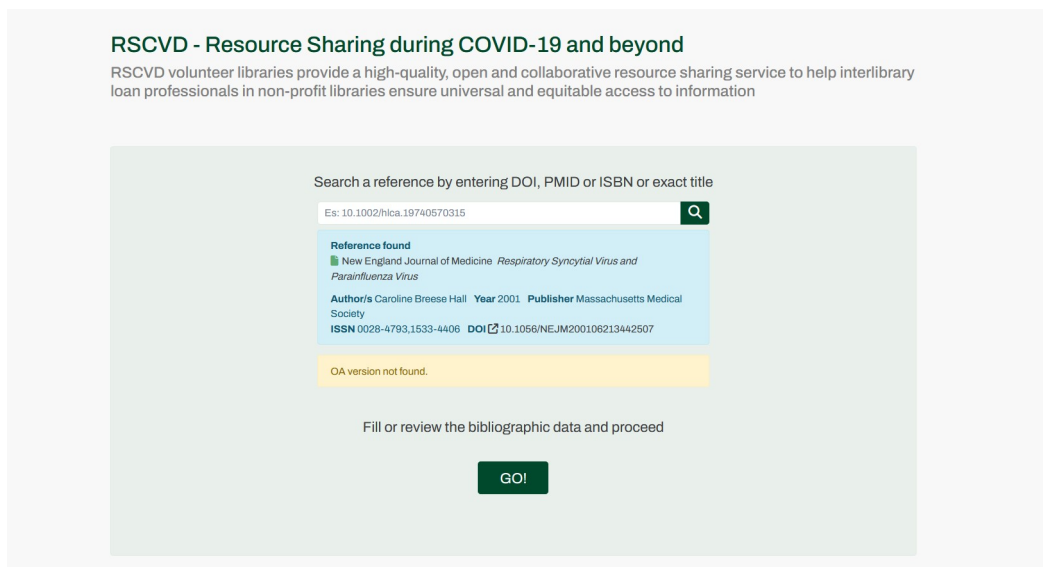


Figure 3: Search for a reference: OA version NOT found

2.2 Sign Up

To enter the TALARIA user environment click on Login/Sign Up in the Home page (at the top right). The first time it will be necessary to Sign Up, it means, to create a new user account. User account is personal; it allows a user to perform one or more roles.

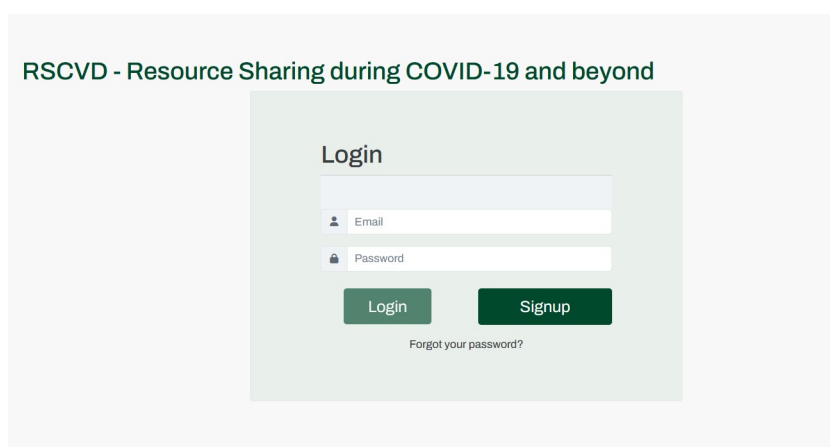


Figure 4: Login/SignUp dialog box

Selecting the SignUp button, you will be requested to fill your personal data, choose password, and to accept the Privacy policy (in compliance with the EU general data protection regulation 2016/679 (GDPR)).

Create your profile

Create your profile

Name

Surname

@ Email

Password

Retype password

Privacy policy

Create your profile

Figure 5: SignUp. Create your profile

The button "Create your profile" creates your personal account. Use this email address and password for future logins.

You are immediately directed to a Library Registration page. This permits to register a new library and assigns to you the role of "Manager" for this library.

2.2.1 Library Registration

The Library registration has 2 steps:

1. Complete the general information about your library and select whether your library has "Basic" or "Full" resource sharing profile. "Basic" means this library may request only from other libraries. "Full" means this library may request and provide documents.
2. Review a summary report of the filled information and submit your registration.

Steps for completing your library general information:

- a. Library location will request to fill your GPS coordinates. The system can get and fill these fields for you ("Click to get coords"). However, if you are registering outside your library, you can fill them manually.
- b. Library name and Library alternative name. In case the name of your library has an English translation, the "Alternative name" can be used.
- c. Website (this field must be an URL).
- d. Nation, State/province, City, Postal Code, Address: all refer to the library physical location address. Note that here the "Nation" refers to the physical location of the library.

Figure 6: Library registration: location and profile section

- e. Service contacts: your library ILL service contacts may be filled here.
- f. Institution. In this section your library will be linked to its belonging institution. This allows, in case there are more libraries belonging to the same institution, to provide useful statistics, to associate protocols and other useful properties which usually an institution (e.g. an university) provides to its own libraries (i.e. link resolver, negotiated e-licenses, etc..).
 - Select your institution type in the drop-down list. See table below⁷:

UNIVERSITY
PUBLIC RESEARCH INSTITUTION
PUBLIC HEALTH INSTITUTION
PUBLIC LIBRARY
SCHOOL
OTHER PUBLIC INSTITUTION
PRIVATE NON PROFIT ORGANIZATION

Table 1: Institution types

- Select your institution nationality. In this case "Nation" refers to the headquarter location of your institution (for instance, a university may have different library locations in more than one country).
- Select your institution name from the dropdown list, which will display all the institutions already present in the system, for the selected type and country. In case your institution is not present in the list, you will be asked to "suggest" your new institution in the system. This information will be checked and approved by the Community manager (see Figure 8).

⁷The list of institution types can be customized in the initial TALARIA setup.

The screenshot shows a registration form with two main sections. The first section, titled 'Service contacts', contains two input fields: 'Email ILL service' and 'Phone ILL service'. The second section, titled 'Institution', contains three dropdown menus: 'Institution type' (with 'Select' as the current value), 'Nation' (with 'Select' as the current value), and 'Institution' (with 'Select' as the current value).

Figure 7: Library registration: Contacts and Institution

The screenshot shows a registration form titled 'Institution'. It contains three dropdown menus: 'Institution type' (with 'Ente pubblico di ricerca' selected), 'Nation' (with 'ITALY' selected), and 'Institution' (with 'Institution not present' selected). Below these is a text input field for 'Suggested institution name' containing the value 'INAF'.

Figure 8: Library registration: Institution not present

- g.** Project or consortium. In this section your library will be linked to an existing consortium or project.
- h.** Library identifiers. This information is essential for identifying uniquely your library. Select the identifier type (see table below⁸) and fill your library ID code.

⁸The list of library identifiers in use can be customized in the initial TALARIA setup.

<i>Identifier type</i>	<i>Description</i>	<i>Library directory</i>
ISIL	<i>International Standard Identifier for Libraries and Related Organisations (ISIL), ISO 15511</i>	
OCLC	<i>Identifier issued by OCLC to member institutions</i>	https://www.oclc.org/en/contacts/libraries.html
ACNP	<i>Italian National Serials Catalogue. It is the code that uniquely identifies the libraries in the Catalogue.</i>	https://acnpsearch.unibo.it/librarysearch
SBN	<i>Italian National Library System. It is the code that uniquely identifies the libraries in the Anagrafe delle Biblioteche Italiane</i>	https://anagrafe.iccu.sbn.it/it/
GTBIB	<i>The Spanish identifier in the Directorio GTBib de centros de préstamo inter-bibliotecario.</i>	https://directorio.gtbib.net/

Table 2: Library identifier types and description

Figure 9: Library registration: Library identifiers

i. Library discipline. Select your library discipline in the drop-down list. See table below⁹:

⁹The list of disciplinary sectors can be customized in the initial TALARIA setup.

SCIENCE AND TECHNOLOGY
BIOMEDICAL SCIENCES
SOCIAL AND LEGAL SCIENCES
HUMANITIES
ART AND ARCHITECTURE
MULTIDISCIPLINARY

Table 3: Library disciplinary sectors

- j. Library resource sharing profile. If your library community has been set up to manage two different library resource sharing profiles (Basic, i.e. borrower only, and Full, i.e. borrower and lender), it is possible to immediately upgrade to Full profile¹⁰. So, if your library is available to borrow from and to lend to the other libraries, select "Yes, Click here". If you clicked on "Yes", the system requests to fill your library online catalog (OPAC) url.

The screenshot shows a web form with the following elements:

- Title:** Library disciplinary sector
- Field:** Disciplinary sector (with a 'Select' dropdown menu)
- Question:** Want to be a Volunteer Library?
- Response Option:** A green button labeled 'Yes, Click here'.
- Text:** Have an inquiry? Please contact us!
- Buttons:** A green 'Continue' button and a grey 'Cancel' button at the bottom.

Figure 10: Library registration: Do you want to upgrade to Full RS profile?

¹⁰Notice that within the RSCVD international initiative libraries which have Full profile, i.e. are lenders as well as borrowers, are called volunteers.

Want to be a Volunteer Library?

[Switch to Basic profile](#)

Library Online Catalog (OPAC)

OPAC website

Have an inquiry? Please contact us!

[Continue](#) [Cancel](#)

Figure 11: Library registration: library OPAC (only for libraries with Full RS profile)

Whatever is the library RS profile you have chosen, to submit your registration, click on "Continue". This will display the summary report for your review. If the data are not correct or are missing, click on the "Back" button. Otherwise, click on "Continue" to submit your library registration request.

Register your library

General informations **Summary Report**

Summary Report

Profile Type	Full (Borrowing+Lending)	Longitude	11.3393257
Latitude	44.522272	Name	Biblioteca Dario Nobili CNR di Bologna
Alternative name	bibliocnbo	Web site	/index.php/it/ http://biblioteca.bo.cnr.it
Country name	ITALY	City	Bologna
Postal code	40129	Address	Via Gobetti 101
Email ILL service	biblio@area.bo.cnr.it	Institution Type	Public research institution
Institution Name	Ricerche Consiglio Nazionale delle	Identifiers	ISIL: IT-BO0561
Disciplinary sector	Science and technology	OPAC website	/custom/BO015 https://acnpsearch.unibo.it

[Back](#) [Submit](#)

Figure 12: Library registration: Review summary report and Submit

The Community manager will take in charge your registration request, verify all data and enable your library to start to request items from other libraries.

2.3 LOGIN

To enter the TALARIA user environment click on Login/Sign Up in the Home page (at the top right). If you already have your personal account, type your email and password and select "Login".

RSCVD - Resource Sharing during COVID-19 and beyond

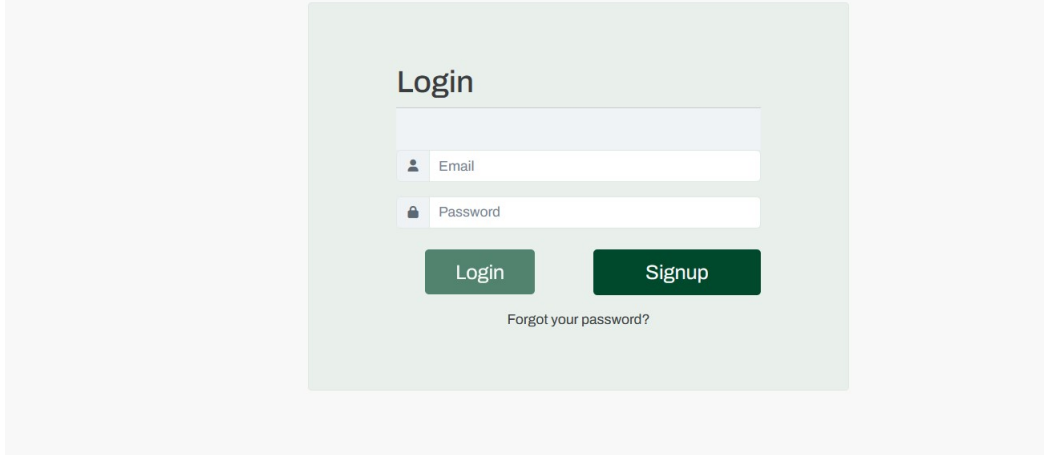


Figure 13: Login dialog box

Once logged in your library environment is displayed.

The "My library" menu displays only the "Status: New" when the library has just been registered (see paragraph 2.2.1) and has not yet been enabled by the Community manager.

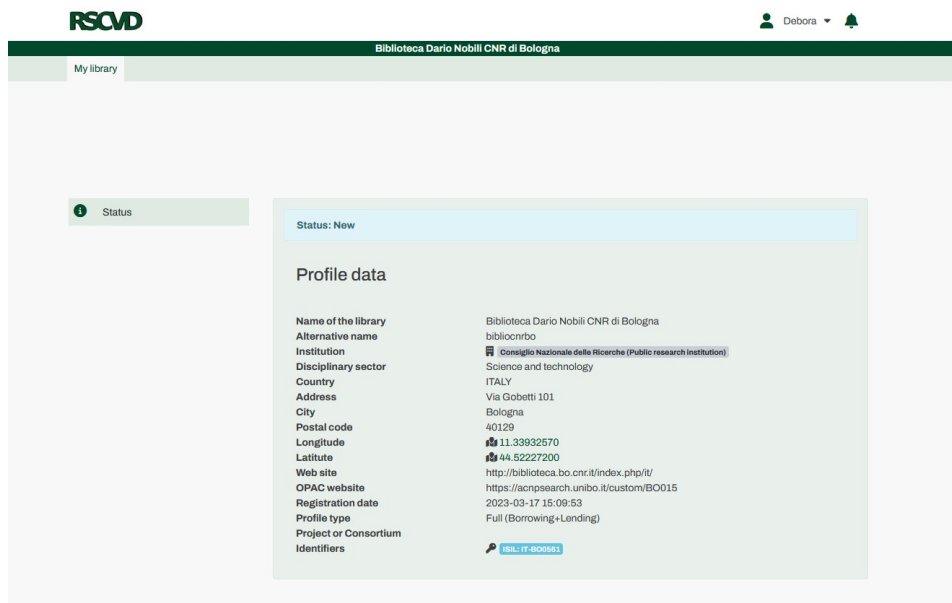


Figure 14: My library: Status new

When your library is activated by the Community manager, all the menus are displayed:

- My library. Status will be "Active".
- Borrowing
- Lending

Note that the other Library operators will see only the menus associated with their role: for example, Borrowing operator will see only My library and Borrowing panel, etc..

RSCVD Debora

Biblioteca Dario Nobili CNR di Bologna

My library Borrowing Lending

- Status
- Library Profile
- Tags

Status: Active

Profile data

Name of the library	Biblioteca Dario Nobili CNR di Bologna
Alternative name	bibliocrbo
Institution	Consiglio Nazionale delle Ricerche (Public research institution)
Disciplinary sector	Science and technology
Country	ITALY
Address	Via Gobetti 101
City	Bologna
Postal code	40129
Longitude	11.33932570
Latitude	44.52227200
Web site	http://biblioteca.bo.cnr.it/index.php/it/
OPAC website	https://acnpsearch.unibo.it/custom/BO015
Registration date	2023-03-17 15:09:53
Profile type	Full (Borrowing+Lending)
Project or Consortium	
Identifiers	IT-000563

Figure 15: My library: Status Active. All menus are displayed

3 User dashboards and user profile panel

After Login you may see the different environments (dashboards) that you can use depending on your different roles in one or more libraries.

To open the user profile panel click on the arrow icon besides your name, at the top right of the page. The panel will display two sections: Profile and Libraries.

- Clicking on "Profile" you can edit your personal data and on "Change password" you can change your password.
- The "Libraries" section will display the libraries you are enabled to work (in case you are enabled to work in more than one library), and clicking on one of them, you can switch from one to another's library dashboard.

Note that Library dashboards will display only the menus associated with your role for that library: ex. Borrowing operator will see only My library and Borrowing panel. The Library manager will see all the menus, etc.

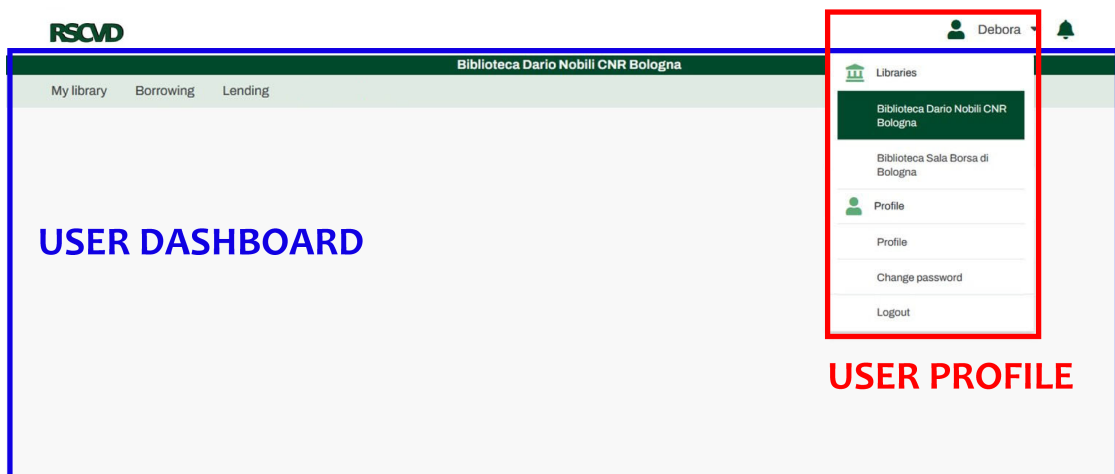


Figure 16: User profile panel. In this figure the user "Debora" manages two libraries. She has selected Biblioteca Dario Nobili and visualizes the corresponding dashboard.

4 My Library

4.1 Status

The "My library" menu displays only the "Status: New" when the library has just been registered (see paragraph 2.2.1) and has not yet been enabled by the Community manager. See figure 14.

When your library is activated by the Community manager, all the menus in your dashboard are displayed. The Status will be "Active". See figure 15.

If your Library has registered to be a borrower only (see paragraph 2.2.1 - point j) you can upgrade to Full profile (i.e. borrower and lending library).

The screenshot shows the 'My Library' dashboard for 'Biblioteca INAF Osservatorio Astronomico Arcetri'. The status is 'Active', and there is a button to 'Upgrade to full profile!'. The profile data is as follows:

Field	Value
Name of the library	Biblioteca INAF Osservatorio Astronomico Arcetri
Institution	INAF Istituto Nazionale di Astrofisica (Public research institution)
Disciplinary sector	Science and technology
Country	ITALY
Address	Largo E. Fermi, n. 5
City	Firenze
Postal code	50125
State/Province	FIRENZE
Longitude	11.33939308
Latitude	44.52235982
Web site	https://www.beniculturali.inaf.it/biblioteche/
Registration date	2023-03-17 15:27:42
Profile type	Basic (only Borrowing)
Project or Consortium	
Identifiers	ISIL: IT-F0302

Figure 17: My library. Status: Active. Library registered with "Basic" profile may upgrade to "Full" profile

4.2 Library Profile

In the Library Profile you can change most of the data you have filled during the registration.

4.3 Tags

It is possible to create new tags that can be used to tag any borrowing or lending request.

Use this menu to create, modify and delete tags.

Tags can be also created into the Borrowing and Lending menus and can be associated to specific requests. They can be used to filter "by tag" the Pending requests lists in Borrowing and Lending.

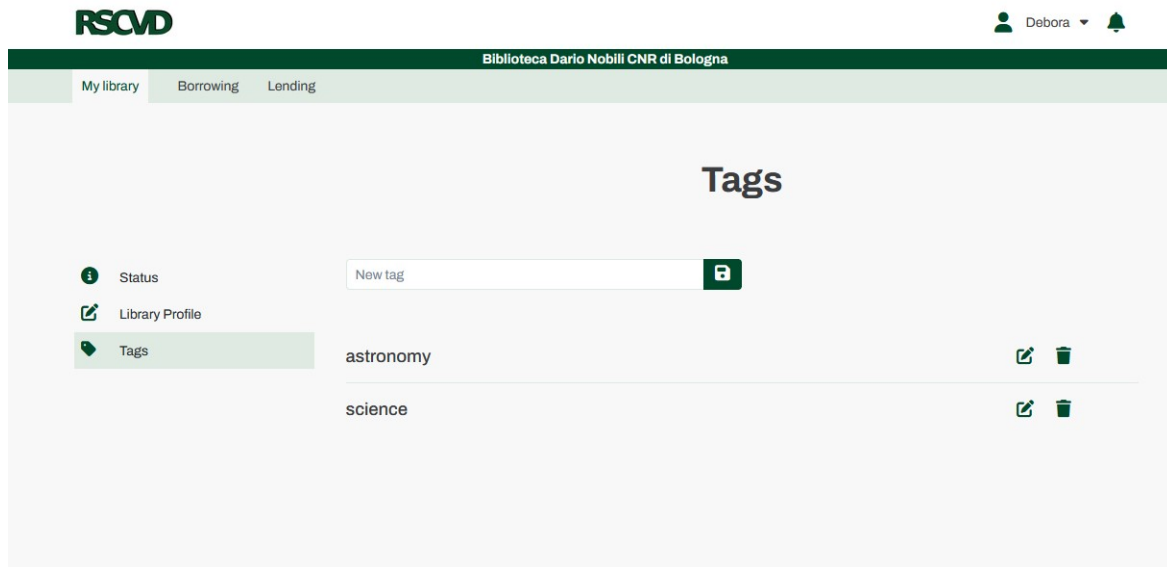


Figure 18: My library. Tags management

5 Borrowing

TALARIA's Borrowing environment is used for submitting new requests to other libraries, to check the status of the requests, to cancel or update them. Borrowing has submenus: New Request, Pending requests, Archive and Tags.

5.1 New Request

To create a new request in the Borrowing environment, use the "New Request" menu. A new reference can be either searched by the exact title or identifier (DOI, PMID or ISBN) and automatically imported, or imported via OpenURL protocol from major online bibliographic databases, or entered manually.

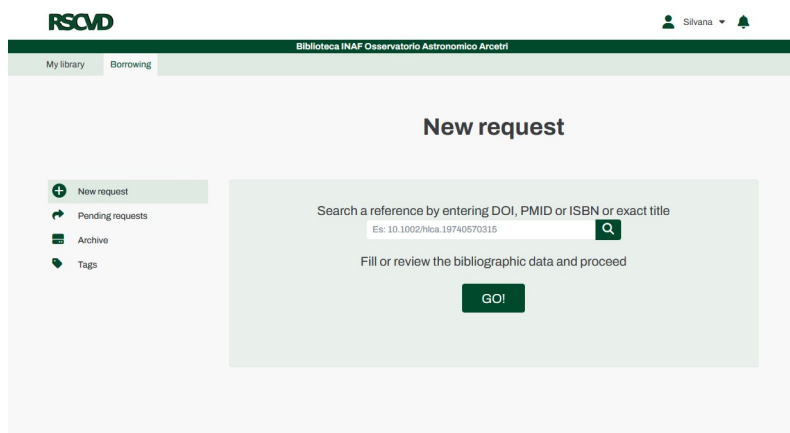


Figure 19: Borrowing: New request

Figure 20: Borrowing: Request Form filled manually or automatically via an OpenURL

Click on "Submit" to create a New Request and to display the Request detail. In the Request detail the bibliographic metadata may be visualized in short or in full mode (see figures 21 and 22). The request is assigned a unique id number. To start processing the request go to the "Pending requests" submenu where you will find the request by its unique id.

Figure 21: Borrowing: New request detail, reference short display

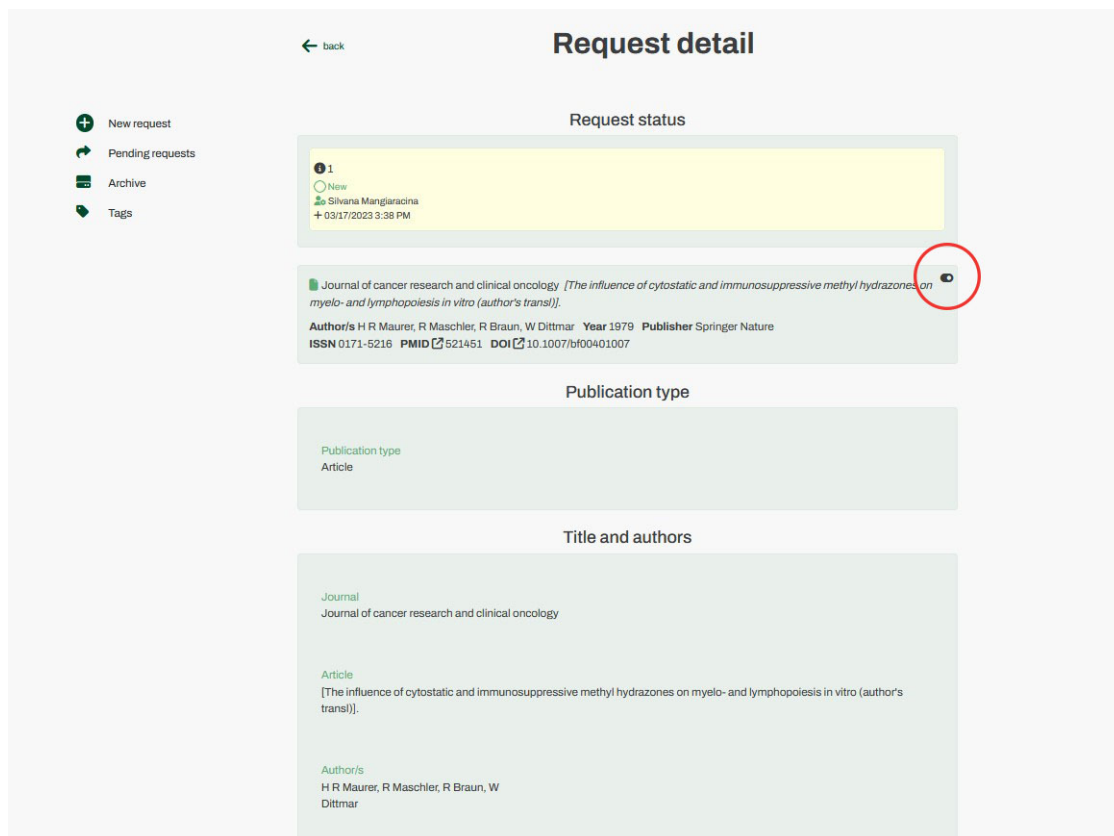


Figure 22: Borrowing: New request detail, reference full display

5.1.1 Open Access integration

The open access integration is one of the most relevant features of TALARIA. This is made possible thanks to the OA button API (<https://openaccessbutton.org/>) developed by OA.Works. The OA button can check if there exists a resource's Open Access version archived in a public repository. If the Open Access version is available, the link to the open resource is directly accessible at the TALARIA user interface.

The OA Link will be displayed immediately and will always be visible in the Request Detail in the Identifiers group.

New request

- New request
- Pending requests
- Archive
- Tags

OA version found, click here to get it!

Publication type

Article
 Book
 Thesis
 Cartography/Map
 Manuscript

Title and authors

Journal: Transactions of the American Clinical and Climatological Association ✓

Article: Medical Schools as moral agents. ✓

Author/s: E D Pellegrino ✓

Series: Series ✓

Publication data

Year: 1977 ✓
 Volume: 88 ✓
 Issue: Issue ✓
 Pages: 54-67 ✓

Publisher: Publisher ✓

Figure 23: Borrowing: New request inserted where an OA version is found

Identifiers

ISSN: 0065-7778

PMID: [898542](#)

Link OA: <https://www.ncbi.nlm.nih.gov/pmc/articles/pmid/898542/pdf/?tool=EBI>

Figure 24: Request detail. OA Link is visible in the Identifiers group (ISSN or ISBN, PMID)

5.2 Pending Requests

Pending requests displays the list of all ongoing requests.

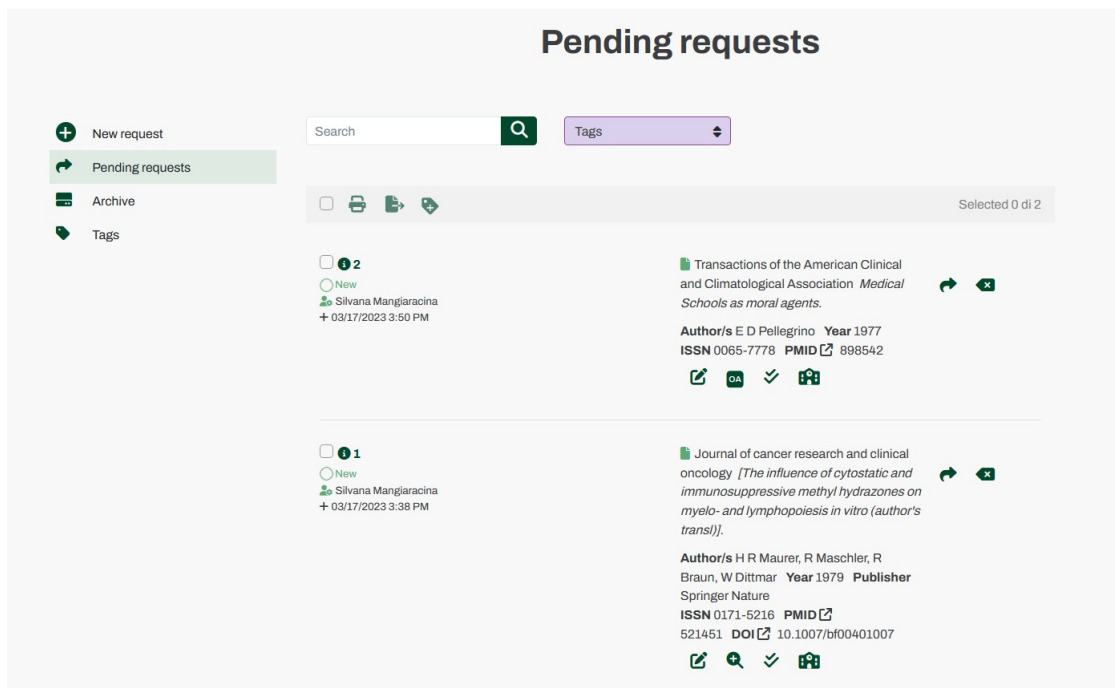


Figure 25: Borrowing. Pending Requests list

5.2.1 New Request processing

On each "new" request listed in the "Pending requests", the actions allowed are to edit the bibliographic reference, check for an open access version, check for ISSN/ISBN, check if the reference belongs to the library's own holdings and, of course, to request the item from another library.

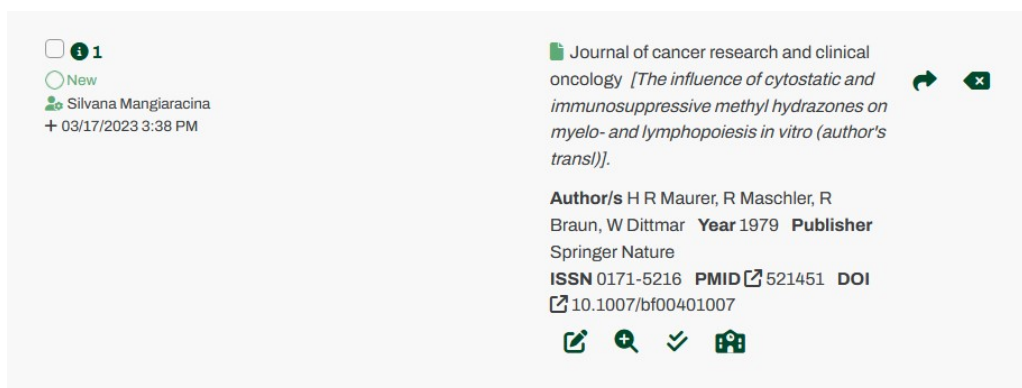


Figure 26: Borrowing. Pending Requests list. Actions on a "new" request

- Edit: Modify bibliographic metadata in New Request
- Check OA: At any moment it can be checked if an OA version is available for the item // OA Available: It links to the item's OA version
- Check ISSN/ISBN: It will look for the journal's ISSN or book's ISBN if missing. // ISSN/ISBN is present [NOT YET IMPLEMENTED]
- Check Holdings: If a link resolver has been set up in the Library Profile, it will link to the link resolver menu. [NOT YET IMPLEMENTED]

For each new request it is possible to start requesting it from another library or to delete it (in the latter case, the delete button allows to delete the request - see Figure 25)

The request button will open a new tab called "Request detail" where it is possible to choose a single provider from the list of all available libraries or to choose the "ALL libraries" option. Then the request will be sent.

In the case of ALL Libraries, the request becomes visible to all the libraries in the community. The first one that is able to provide the item will deal with the request, claiming to fulfill it. In the Lending environment, these requests are called "Orphaned requests".

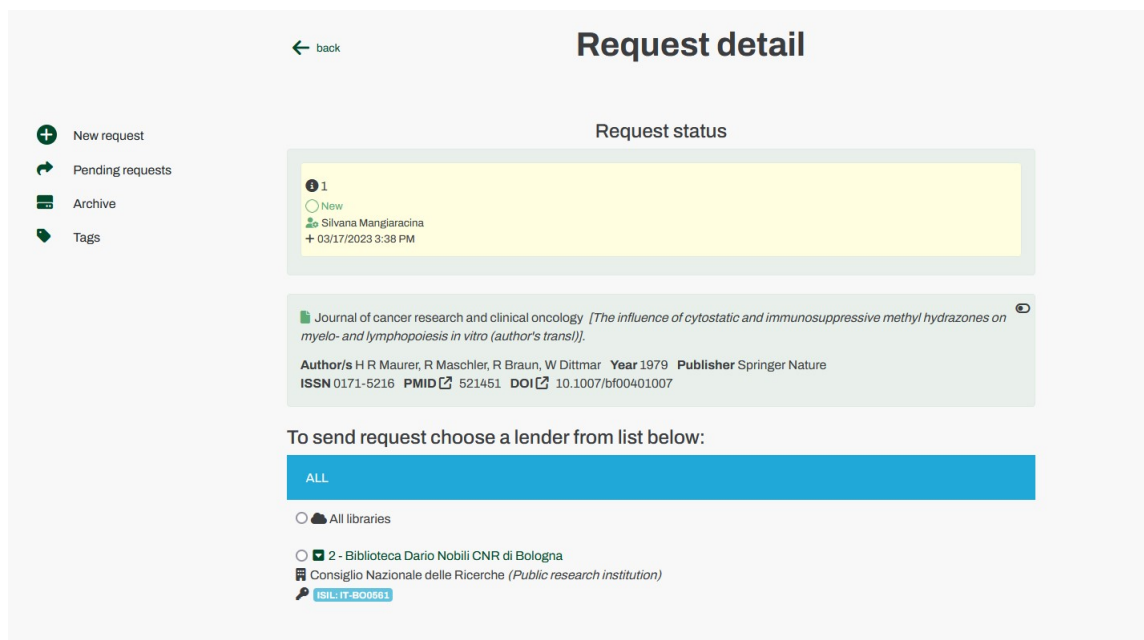


Figure 27: Borrowing: Choose one lender library or ALL libraries to request from

In the "Pending requests" list, a request may be cancelled or, in case of not fulfillment, it can be repeated and sent again to another library or to ALL.

5.2.2 Requested request processing

A new request that has been forwarded to a single or All libraries changes its status into "Requested", awaiting to be accepted. A counter will display the number of days passed from the request date.



Figure 28: Borrowing: Pending Requests list. Request sent to a single library

If a request has been sent to ALL libraries a cloud icon and the name "All libraries" will be displayed until a library will accept it.



Figure 29: Borrowing: Pending Requests list. Request sent to ALL libraries

When some library accepts to supply it, the name of the lender library will be displayed.

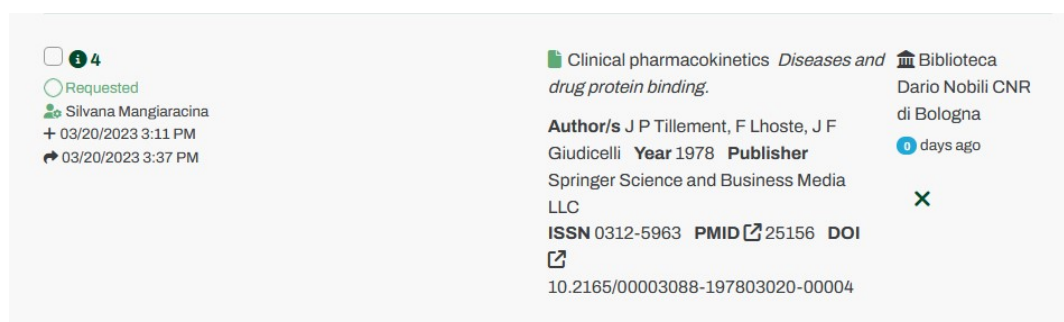


Figure 30: Borrowing: Pending Requests list. A request sent to ALL libraries has been accepted and, consequently, the name of the accepting library is displayed

While a request is in the "Requested" status the only possible action for borrower is to cancel the request. The behavior of the cancel operation is different and it will depend on the lending library. If the request has not been accepted yet, then the cancel operation will immediately cancel the request and it will be put again in the "New request" status. Instead, if a lender library has accepted the request, then the cancel action will not be executed immediately but it will be actually "a request for cancellation" and the status changes into "Cancel requested" (see Figure 31 and for the Lending side see Figure 47).



Figure 31: Borrowing: Cancel requested

A request in the "Requested" status will change status depending on the action taken by the lender library. If the request has been fulfilled it will change to the "Received" status (see Fig. 32 and 33)

1
● Received
 Silvana Mangiaracina
 + 03/17/2023 3:38 PM
 → 03/20/2023 3:31 PM
 ↶ 03/20/2023 3:52 PM

■ Journal of cancer research and clinical oncology [The influence of cytostatic and immunosuppressive methyl hydrazones on myelo- and lymphopoiesis in vitro (author's transl)].
 Author/s H R Maurer, R Maschler, R Braun, W Dittmar Year 1979 Publisher Springer Nature
 ISSN 0171-5216 PMID [521451](#) DOI [10.1007/bf00401007](#)

Biblioteca Dario Nobili CNR di Bologna



Figure 32: Borrowing: Received request: an electronic document is available for download

4
● Received
 Silvana Mangiaracina
 + 03/20/2023 3:11 PM
 → 03/20/2023 3:37 PM
 ↶ 03/20/2023 3:53 PM

■ Clinical pharmacokinetics Diseases and drug protein binding.
 Author/s J P Tillement, F Lhoste, J F Giudicelli Year 1978 Publisher Springer Science and Business Media LLC
 ISSN 0312-5963 PMID [25156](#) DOI [10.2165/00003088-197803020-00004](#)

Biblioteca Dario Nobili CNR di Bologna



Figure 33: Borrowing: Received request: an electronic document is available via URL

Otherwise, if the lending library does not fulfill the request, it will change into the "Not fulfilled" status.

6
● Not fulfilled
 Silvana Mangiaracina
 + 03/20/2023 3:46 PM
 → 03/20/2023 3:46 PM
 ↶ 03/20/2023 3:54 PM

■ Die Pharmazie Influence of physostigmine on the contractility and ionic balance of isolated trabecular muscle of rat ventricle.
 Author/s T Kovács Year 1979
 ISSN 0031-7144 PMID [515165](#)

Biblioteca Dario Nobili CNR di Bologna




Figure 34: Borrowing: Not fulfilled request

5.2.3 Received/Fulfilled request processing

A request which has been fulfilled goes to the "Received" or to the "Fulfilled" status, depending on the fulfillment method chosen by the lender library.

The possible actions are:

- If there is a file or a URL, the file or the URL can be immediately opened and downloaded (Fig. 32 and 33) in order to be verified. To proceed, click on the "Check document" icon for confirming that the document has been verified.

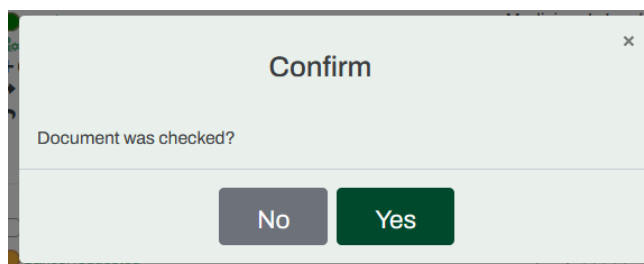


Figure 35: Borrowing: Received request. Check the document received

Now there are two options:

1. the received document or URL is correct, so it can be archived (archive icon). The request disappears from the pending request menu and it will be possible to retrieve it from the archive menu.
2. the received document is damaged or wrong, the request can be "trashed" (trash icon). The request remains in the Received status but the document is not usable so the request can be requested again from same or from another library or can be archived.



Figure 36: Borrowing: Received request has been verified. Two actions are possible: archive or trash it

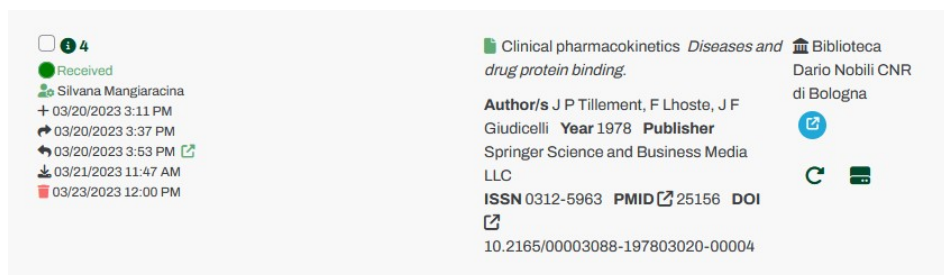


Figure 37: Borrowing: Received request has been verified and then trashed. It is possible to repeat the request (or archive it)

- If the item has been sent via mail or fax or Article Exchange (A.E.) or other means, there will be possible more actions upon the arrival of the item (see Figure 38)
 1. Set as received. The status will become "Received" and the request can be archived. The request disappears from the pending request menu and it will be possible to retrieve it from the archive menu. Or the request can be "trashed" (trash icon).
 2. Set as not received. In this case the behavior will be the same as described in following paragraph "5.2.4 Not received request processing".

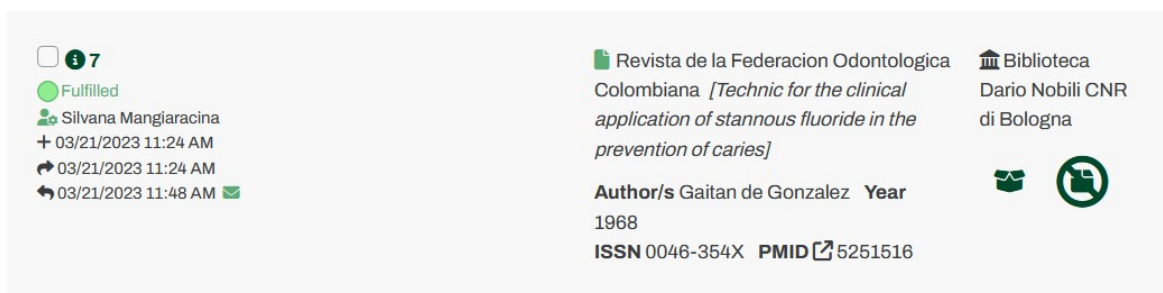


Figure 38: Borrowing: Fulfilled request via mail or fax or Article Exchange (A.E.) may be set to received upon its arrival

5.2.4 Not received request processing

There are two cases:

- the request is in "Not received" status because a lender has not fulfilled it
- the request has been fulfilled by the lender (via fax, mail, A.E, other) but the item has never arrived.

In both cases it will be possible to archive the request or to repeat the request, i.e. request the item from a new library.



Figure 39: Borrowing: Not received request may be reiterated to a new library or archived

5.3 Archive

The Archive environment stores all the concluded borrowing requests.

5.4 Table of Borrowing actions and icons
















ICON	ACTION	DESCRIPTION	IMPLEMENTED
	<i>Request an item</i>	<i>It will open a new tab called "Request detail" where is possible to choose a single provider from the list of all available libraries or to choose the "ALL libraries" option. Then it will send the request.</i>	Y
	<i>Delete request</i>	<i>It will delete a new request and it will be deleted from the database.</i>	Y
	<i>Edit</i>	<i>Modify bibliographic metadata in New Request</i>	Y
	<i>Check OA</i>	<i>At any moment it can be checked if an OA version is available</i>	Y
	<i>OA Available</i>	<i>It will link to the OA version of the item</i>	Y
	<i>Check Holdings</i>	<i>If a link resolver has been set up in the Library Profile, it will link to the link resolver menu.</i>	N
	<i>Check ISSN/ISBN</i>	<i>It will look for the ISSN or ISBN of the journal or book if missing.</i>	N
	<i>Reiterate request</i>	<i>It will clone and repeat the same request to another library</i>	Y
	<i>ISSN/ISBN is present</i>	<i>Unique identifier for a journal or a book is present</i>	N
	<i>Cancel request</i>	<i>It will cancel a pending request which is awaiting to be accepted or it will request to cancel an accepted request</i>	Y
	<i>Check document</i>	<i>Document check: the file is not damaged or wrong</i>	Y
	<i>Received item</i>	<i>Item received</i>	Y
	<i>Not received item</i>	<i>Item not received</i>	Y
	<i>Trash request</i>	<i>The received document is damaged or wrong, the request is trashed</i>	Y
	<i>Archive</i>	<i>The request is archived</i>	Y

Table 4: Borrowing: Action buttons



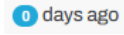




ICON	INFORMATION	DESCRIPTION	IMPLEMENTED
	<i>Information + request id</i>	<i>It will open the detailed request identified by a unique id</i>	Y
	<i>Open/close bibliographic metadata details</i>	<i>In the request detail it will open or close the bibliographic metadata details</i>	Y
	<i>Days counter</i>	<i>The counter icon counts the days since the request has been submitted</i>	Y
	<i>Material type:Book</i>		
	<i>Material type:Article</i>		
	<i>File ready</i>	<i>File is available to open/download. Click to open it</i>	Y
	<i>URL</i>	<i>File is available at URL. Click to open it</i>	Y

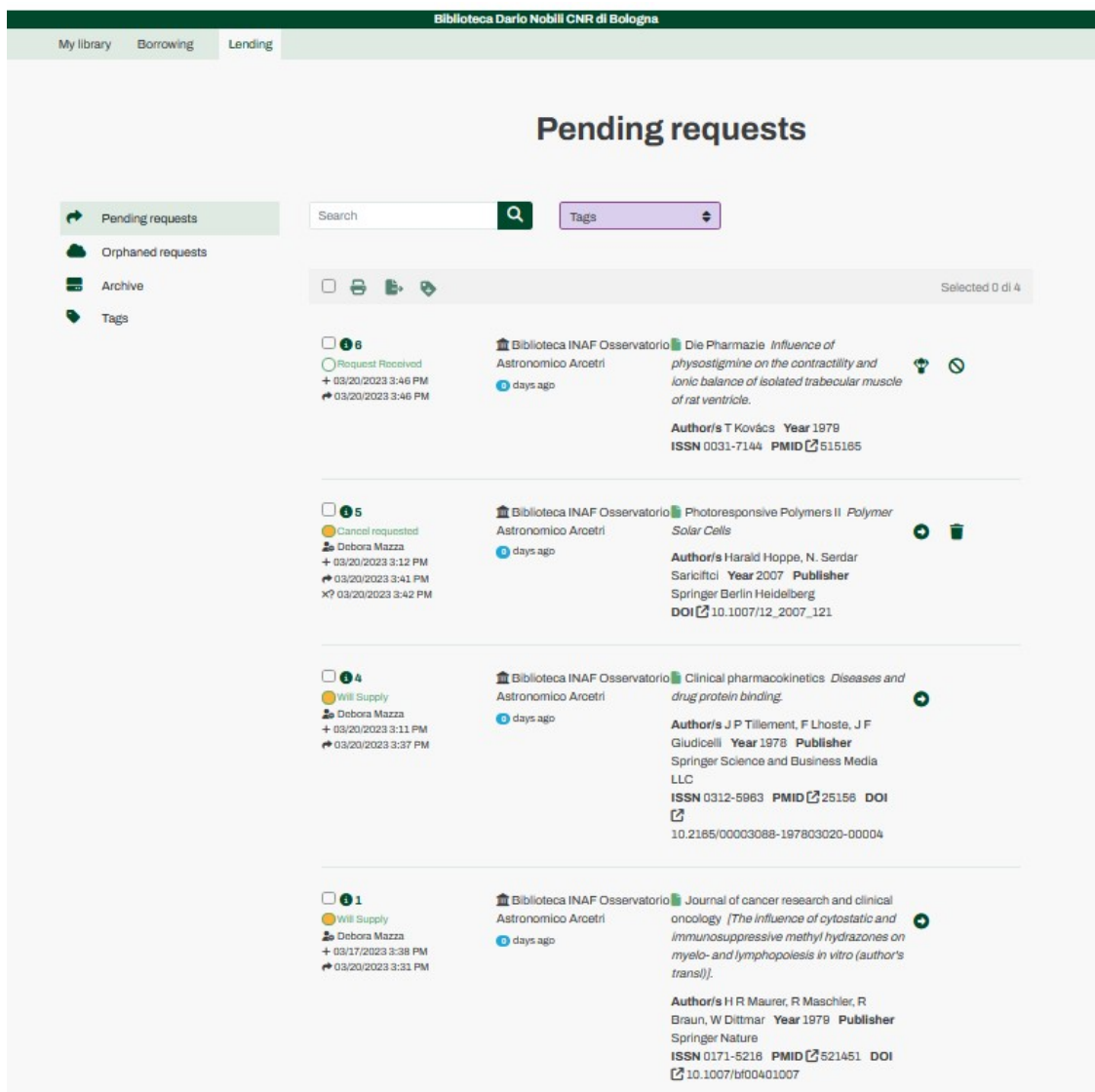
Table 5: Borrowing: Information icons

6 Lending

TALARIA's Lending environment is divided into Pending requests, Orphaned requests, Archive and Tags.

6.1 Pending Requests

Pending requests contains the list of all requests received and taken over by the library.



The screenshot displays the 'Pending requests' interface of the 'Biblioteca Darlo Nobili CNR di Bologna'. The page features a navigation menu on the left with options for 'Pending requests', 'Orphaned requests', 'Archive', and 'Tags'. The main content area shows a list of four pending requests, each with a status icon, a title, author information, and a date. The status icons include 'Request Received', 'Cancel requested', 'Will Supply', and 'Will Supply'. The requests are as follows:

- Request 1:** Status: Request Received (03/20/2023 3:46 PM). Title: Die Pharmazie *Influence of physostigmine on the contractility and ionic balance of isolated trabecular muscle of rat ventricle.* Author: T Kovács, Year 1979. ISSN: 0031-7144, PMID: 515165.
- Request 2:** Status: Cancel requested (03/20/2023 3:12 PM). Title: Photoresponsive Polymers II *Polymer Solar Cells*. Author: Harald Hoppe, N. Serdar Sariciftci, Year 2007. Publisher: Springer Berlin Heidelberg. DOI: 10.1007/12_2007_121.
- Request 3:** Status: Will Supply (03/20/2023 3:37 PM). Title: Clinical pharmacokinetics *Diseases and drug protein binding*. Author: J P Tillement, F Lhoste, J F Giudicelli, Year 1978. Publisher: Springer Science and Business Media LLC. ISSN: 0312-5983, PMID: 25156, DOI: 10.2185/00003088-197803020-00004.
- Request 4:** Status: Will Supply (03/17/2023 3:38 PM). Title: Journal of cancer research and clinical oncology *[The influence of cytostatic and immunosuppressive methyl hydrazones on myelo- and lymphopoiesis in vitro (author's transl)].* Author: H R Maurer, R Maschler, R Braun, W Dittmar, Year 1979. Publisher: Springer Nature. ISSN: 0171-5218, PMID: 521451, DOI: 10.1007/bf00401007.

Figure 40: Lending: Pending requests

On each new pending request, the actions allowed are to accept the request by clicking on the "I will supply" icon or do not fulfill (Figure 40, request n. 6).

After having accepted the request, it's possible to manage it. The status of the request will change from "Request received" to "Will supply". By clicking on the proceed icon (Figure 40, requests n. 4 and 1) it will open the request's detail and it will be possible to fulfil it. The possibility of not fulfilling is always given, in case something actually makes fulfillment not possible. (Figure 41)

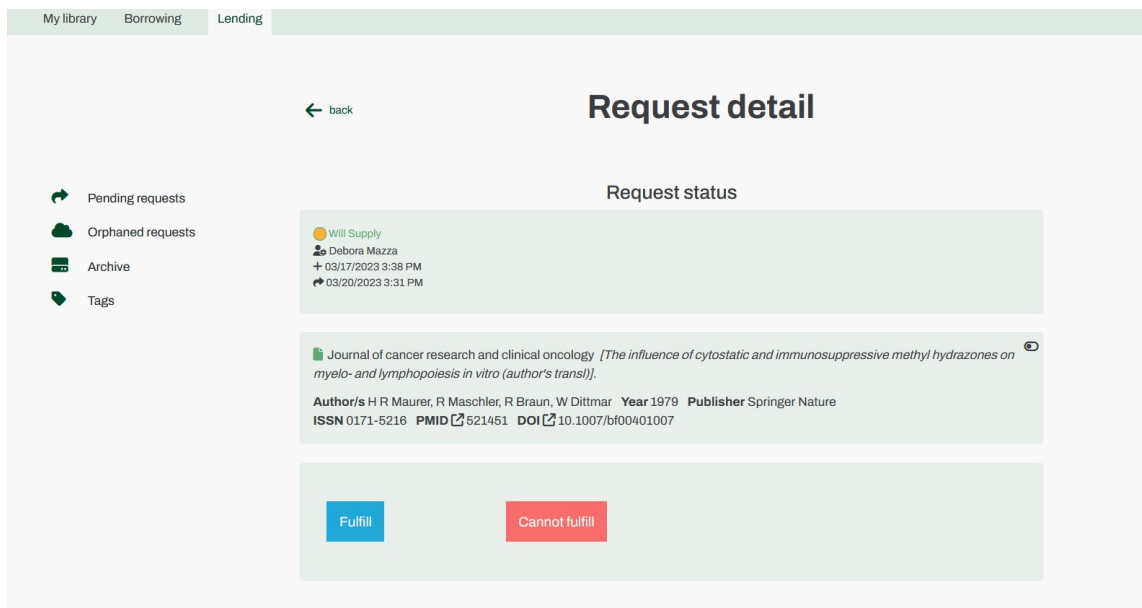


Figure 41: Lending: Request fulfillment

6.1.1 Fulfill process

By clicking on "fulfill" will collapse a tab where it is possible to choose the delivery method. The possibilities are: File, Mail, Fax, URL, Article Exchange (A.E.) and Other.

Figure 42: Lending: Select the delivery methods among: File, Mail, Fax, URL, Article Exchange (A.E.) or Other

If Lender may provide an electronic document it is possible to process the request through the system

by choosing as delivery method "File". After uploading the file you click on "Upload file" to upload it inside the system. Clicking on "Submit" will process the request to the borrowing library (Figure 43). Selecting as delivery method "URL" it is necessary to insert the link to the requested material (Figure 44).

The screenshot shows a web form titled "Fulfill" with a light green background. At the top, there is a dropdown menu labeled "Choose delivery method" with "File" selected. Below this, a file selection area shows "Select file to upload" with a file named "Sfogle... 2.jpg" and an "Upload file" button. A green message states "File uploaded successfully". The form contains three input fields: "Lender Protocol Nr.", "Inventory number", and "Lending notes", each with a green checkmark to its right. A blue text box contains a disclaimer: "By submitting this form, I agree to comply with any relevant national copyright legislation and to any license governing the use of the requested document when utilizing the RSCVD Service. I commit to make and provide copies of the requested documents by directly completing any and all tasks related to the delivery of these copies. I undertake to adequately inform the requesting library about the limits of use of the documents provided through the RSCVD Service." At the bottom left, there is a green "Submit" button.

Figure 43: Lending: Delivery method: File

The screenshot shows a web form titled "Fulfill". At the top, there is a dropdown menu labeled "Choose delivery method" with "URL" selected. Below this are four input fields, each with a green checkmark on the right side, indicating they are filled or valid: "URL" (containing "http://www.giulionatta.it/pdf/publicazioni/00317.pdf"), "Lender Protocol Nr.", "Inventory number", and "Lending notes" (a larger text area). At the bottom of the form is a green "Submit" button. A light blue disclaimer box is located above the button, containing the following text: "By submitting this form, I agree to comply with any relevant national copyright legislation and to any license governing the use of the requested document when utilizing the RSCVD Service. I commit to make and provide copies of the requested documents by directly completing any and all tasks related to the delivery of these copies. I undertake to adequately inform the requesting library about the limits of use of the documents provided through the RSCVD Service."

Figure 44: Lending: Delivery method: URL

The other delivery method (Fax, Mail, A.E) are provided outside the system.

6.1.2 Not fulfillment process

It is possible to not fulfill a new request in the "Request received" status or after having accepted the request ("Will supply" status). The action button will open the Request details and then the "Cannot fulfill" button will display a tab with all the possible reasons to select, and then submit it.

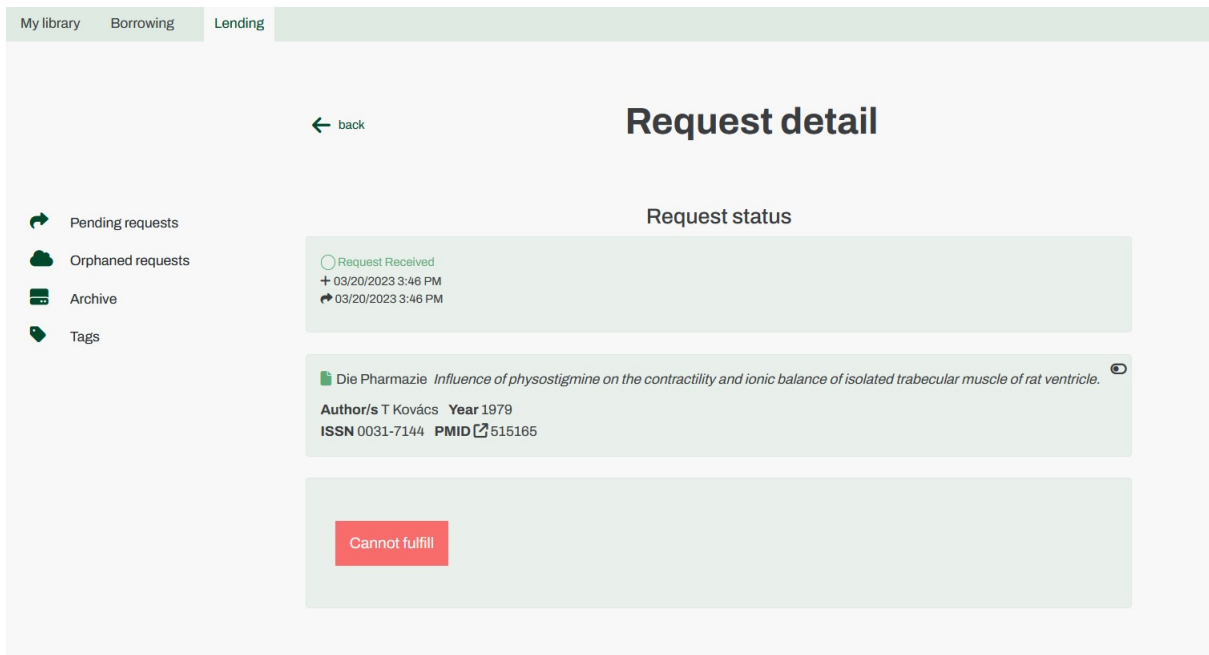


Figure 45: Lending: Cannot fulfill

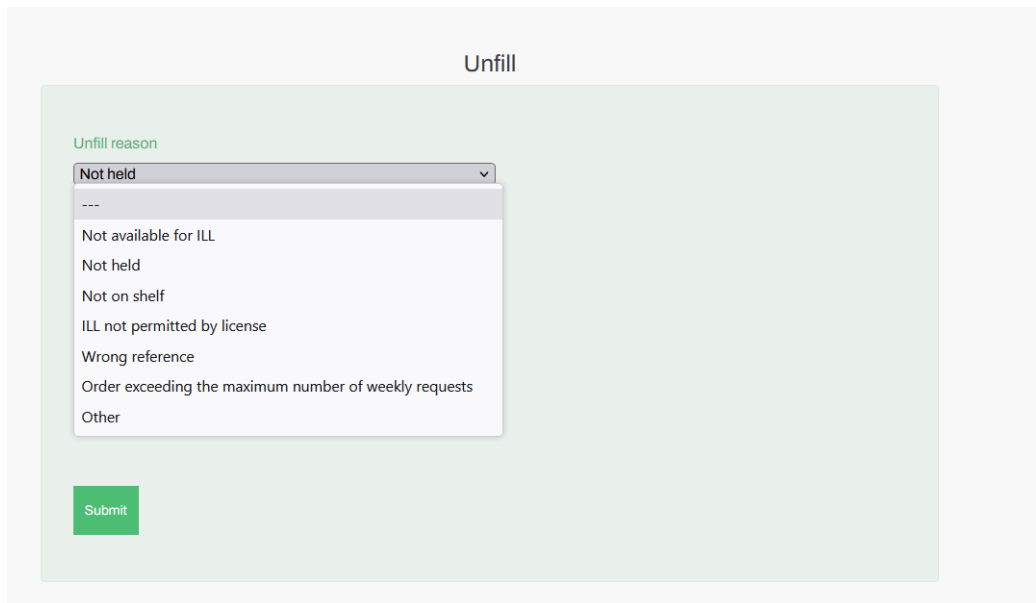


Figure 46: Lending: Cannot fulfill reasons

6.1.3 Cancel requested

A borrowing library can request the cancellation of a request at any time. The behavior changes: if the Lending library has not accepted yet the request (Lending Status: Request received) the request is immediately cancelled and disappears from the list of pending requests. If the lending library has already accepted to supply (Lending Status: Will supply), the status of this request will change in "Cancel requested" (fig. 31). The lender has two possibilities: to accept to cancel the request or to fulfill the document anyway.

Figure 47: Lending: Cancel requested

6.2 Orphaned Requests

The Orphaned requests menu opens a "community board" that displays those requests visible to all libraries (Figure 48). As for normal requests, it is necessary to click on the "I will supply" button to accept a request to supply it. After accepting the Orphaned request, the other libraries will no longer be able to see it or fulfil it. At this point, the request will be visible in the own Lending Pending Requests and it will be possible to manage it (Figure 49 request n. 4).

Figure 48: Lending: Orphaned requests

Pending requests

- Pending requests
- Orphaned requests
- Archive
- Tags

Tags

Selected 0 di 2

4

Will Supply

Debra Mazza

+ 03/20/2023 3:11 PM

➔ 03/20/2023 3:37 PM

Biblioteca INAF Osservatorio Astronomico Arcetri

Clinical pharmacokinetics *Diseases and drug protein binding.*

days ago

Author/s J P Tillement, F Lhoste, J F Giudicelli **Year** 1978 **Publisher** Springer Science and Business Media LLC

ISSN 0312-5963 **PMID** 25156 **DOI** 10.2165/00003088-197803020-00004

1

Request Received

+ 03/17/2023 3:38 PM

➔ 03/20/2023 3:31 PM

Biblioteca INAF Osservatorio Astronomico Arcetri

Journal of cancer research and clinical oncology [*The influence of cytostatic and immunosuppressive methyl hydrazones on myelo- and lymphopoiesis in vitro (author's trans)]*.

days ago

Author/s H R Maurer, R Maschler, R Braun, W Dittmar **Year** 1979 **Publisher** Springer Nature

ISSN 0171-5216 **PMID** 521451 **DOI** 10.1007/bf00401007

Figure 49: Lending: An orphaned request that has been accepted to supply moves to own pending requests.

6.3 Archive

The Archive environment stores of the concluded lending requests.

6.4 Table of Lending actions and icons





ICON	ACTION	DESCRIPTION	ACTIVE
	<i>I will supply</i>	<i>It accepts to supply the requested document</i>	Y
	<i>Proceed to Fulfill or Not fulfill</i>	<i>It will open the request detail and it will be possible to whether fulfill or not fulfill the request.</i>	Y
	<i>Not fulfill</i>	<i>If the request is in "Request received" status it will open the request detail to not fulfill it.</i>	Y
	<i>Accept cancel request from the borrower library</i>	<i>If the request is in the "Cancel requested" status it will accept the cancelation</i>	Y

Table 6: Lending: Action buttons

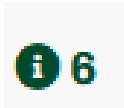

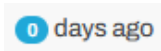
ICON	INFORMATION	DESCRIPTION	ACTIVE
	<i>Information + request id</i>	<i>It will open the request detail</i>	Y
	<i>Open/close bibliographic metadata details</i>	<i>In the request detail it will open or close the bibliographic metadata details</i>	Y
	<i>Days counter</i>	<i>The counter icon counts the days since the request has been received</i>	Y

Table 7: Lending: Information icons