
Chapter 7: Bulk Action processing multiple requests

When to use Bulk action processing on multiple requests

You may process multiple requests requiring the same activity using **Bulk Action**. All requests to be processed together must have the same action and particulars.

For instance, if you are processing multiple requests with 'Answer Non-Supply' you should be selecting the same reason for non-supply for that group, such as "In Use on Loan".



There are many VDX actions that can be efficiently processed 'in bulk'.

- Received
- Returned
- Answer Will Supply (group being processed must be same reason for Will Supply)
- Answer Conditional (group being processed must be same condition)
- Answer Non-Supply (group being processed must be same reason for Non-Supply)
- Shipped (group being processed must be same due date and loan conditions)
- Recalled
- Checked-In

Selecting requests for bulk action:

1. Select the small box to the left of the individual requests you want to process with Bulk Action. This puts a check mark on the items you select. You can also use [Select all](#) and [Deselect all](#).

Number of Results: 5

Bulk Action:  [Select all](#)  [Deselect all](#) [Bulk Action](#)

Perth:15878979 / BruceCountyMN:15878978
The boys in the boat - nine Americans and their epic quest for gold at the 1936 Berlin Olympics **11 Jan return please**
Brown, Daniel 1951- | ISBN: 9780670025817
Notes: Thanks for your email.,
Status: In Process: Authorisation: For Manual Acknowledgement Last Action: REQUEST-Indication:08 Nov 2017

Perth:15878960 / BruceCountyMN:15878958
The life we bury - a novel **20 Jan return please**
Eskens, Allen 1963-. | ISBN: 9781616149987 (paperback)
Notes: Thanks for your email.,
Status: In Process: Authorisation: For Manual Acknowledgement Last Action: REQUEST-Indication:08 Nov 2017

2. Select '**Bulk Action**' button to submit selected requests for bulk authorization. A bulk action authorization screen will display.

Bulk Action / Authorisation

Enter ILL numbers, separated by blanks or commas

ILL Numbers

Select either an action, authorisation status or process status for all the requests

Action

Authorisation Status

[Reset Form](#)

Choose a bulk action:

1. Select the desired bulk action from the **Action** pull down menu and Submit.
2. Respond accordingly to the next screen by entering the details for the selected action. This information should apply to all the requests selected.

For example:

- Select 'Returned' from Action pull down menu and Submit.
 - This displays the ILL request form for the 'Action: Returned' state.
3. Add a Public and/or Private Note if appropriate and 'Submit'. Any note you enter would need to apply to all of the requests in the bulk action.
 4. The **Bulk Action/Authorization Report** indicates which requests were successful. If some of them were not, check the status.

Bulk Action/Authorisation Report

Successful

15191110
15200606
15209047

Failed

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One of the requests "Failed" the bulk action because it was in a Not Supplied state and therefore inappropriate to update to "Returned"

15205370 **Selected Bulk Action 'Returned' is not applicable to this request.**

Bulk Action screen for text entry of request numbers

As an alternative to placing tick marks on individual requests on a result screen you can type in request numbers separated by blanks or commas on a *'blank'* bulk action screen retrieved by selecting the [Bulk Action](#) link at the top of the ILL Request Search screen.



Tip: The *blank* bulk action screen is useful for:

- typing in multiple request numbers from a Pick List that you plan to update with Answer Non-Supply or Shipped.
- typing in multiple request numbers from a stack of “Thank You for the use of this material” slips that accompanied returned items that need to be updated to a ‘Checked-In’ status.