

# VDX Manual for Member Libraries



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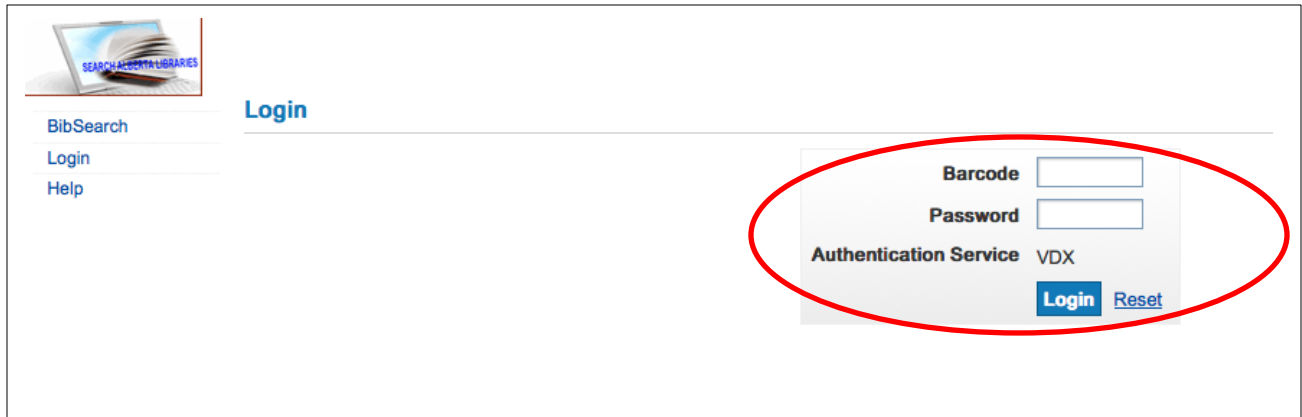
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## How to Access VDX

Getting to VDX

To access VDX, launch an internet browser (Firefox, IE, etc.). Go to: <https://alberta.vdxhost.com/vdx/>

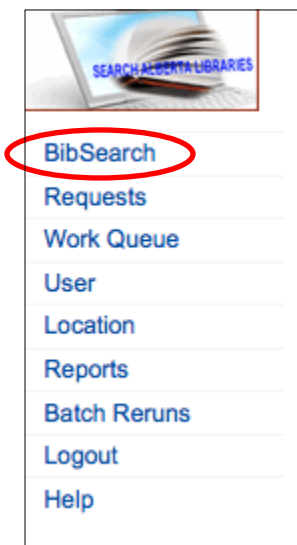
This is the opening VDX screen:



Here you enter your Barcode and Password. Your barcode is the username that you have been given by your Chinook Arch. The barcode is not case sensitive. However, the password is case sensitive. Enter is exactly as it have been given to you.

## Searching VDX

To search for items to borrow in VDX click on the BibSearch link.



This will take you to the Advanced search page (below).

The Advanced Search allows you to search a selected field, for example, Title, Author, ISBN along with other fields (ie. Title and Author)

Use this form to conduct more advanced searches of Service Provider catalogues and other resources. To issue a simple keyword search of Service Provider catalogues use the [Standard Search page](#).

**Search** [Reset Form](#)

Choose a field name (e.g., title, any) and the word or phrase you want to search (e.g., dickens, "black holes").  
Use AND, OR and AND NOT to combine or limit the search terms and make the search more specific.

### Advanced Search

Field	Search Term	Operator
Title	<input type="text"/>	and
Author	<input type="text"/>	and
ISBN	<input type="text"/>	

Refinement  On  Off    Records per page

### Profile

Current Profile:


[Collections](#)

### Searchable Collections







[AMICUS](#)

Click on the drop down arrow to select the relevant search field. Once you have entered your search terms click the blue Search button. The Reset Form link clears the form.

Once you have run a search and found the item that you would like to request click on the Request button.

 [Save search](#)

Result pages: 1 [2](#) >

- [Atomic ranch : design ideas for stylish ranch homes / Michelle Gringeri-Brown ; photographs by Jim Brown.](#)**  
Salt Lake City : Gibbs Smith, c2006.  
Number of holdings: 1 | ISBN - 1423600029 9781423600022 | LCCN - 2006004614  
Collection: TRAC  
 [Save](#)  [Request](#)  [Details](#)
- [Atomic ranch : midcentury interiors / Michelle Gringeri-Brown ; with photographs by Jim Brown.](#)**  
Layton, Utah : Gibbs Smith, 2012.  
Number of holdings: 1 | ISBN - 9781423619314 | LCCN - 2011038361  
Collection: TRAC  
 [Save](#)  [Request](#)  [Details](#)
- [Atomic ranch midcentury interiors / Michelle Gringeri-Brown ; photographs by Jim Brown.](#)**  
Layton, Utah : Gibbs Smith, 2012.

Note: VDX displays an initial set of 10 hits from each collection search, if you don't see the item you are looking for on the first page you can find further results by clicking on the Results page links found at the top or bottom of the results.

## Making an ILL Request

Once you have found a record you want to request and you have clicked the request button you will see this screen.

### ILL Request

[Request](#) [Reset](#)

---

[Request Details](#)

**Authorisation Status**

**Item Format**

---

[Service Details](#)

<b>Service 1</b>	<b>Service 2</b>
<b>Service Type</b> <input type="text" value="Loan"/>	<b>Service Type</b> <input type="text"/>
<b>Media Type</b> <input type="text"/>	<b>Media Type</b> <input type="text"/>

---

[Item Details \(Book\)](#)

Use Our Local Number to record your locally defined running number for this request

**Our Local Number**

**Title**

**Subtitle**

**Author**

Leave the Authorization Status as To be Authorized

Next scroll down to the Patron Details

[Patron Details](#)

**Patron Barcode**  [Validate](#)

**Authentication Service**

---

**Patron Name** Sarah Test

**Patron Barcode** 2012

**Patron ID** 63626

**Patron status** PATR

**Patron Email**

**Amount willing to pay**

You will need to add a patron and validate them using the Validate button. Insure that your patron has Patron Status of PATR – if not you will need to update their record -see searching for user records for

more information. After you have their information in Patron Details with the Authorization status of To be Authorized hit the request button.

You will see this screen

## New Request

---

### Request Result

Your request has been successfully submitted.

The system has assigned the ILL number **914345** to the request.

Use the [Requests](#) option to track the status of this request.

### Request Details

– LOAN Request – 27 Nov 2012 –

Request Number:	914345
Title:	Atomic ranch
Author:	Gringeri-Brown, Michelle;Brown, Jim (James Scott), 1951-
Date of publication:	2012.

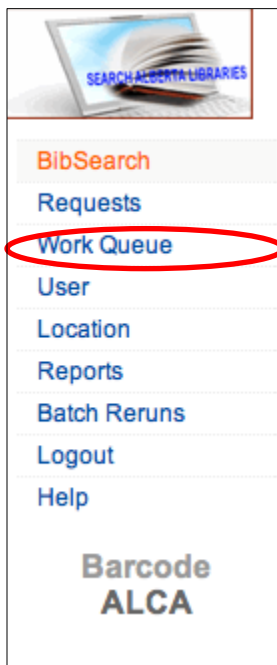
VDX will build a rota and the request will appear later in your Work Queue in the Idle queue.

**Remember: To be Authorized + Patron Status of PATR = VDX auto built Rota.** Remember this saying in mind you will be able to easily request items through VDX.

## The Work Queue

The **Work Queue** gives you a quick view of all your active requests, both as borrower and as lender. It is the main tool within **VDX** for managing your requests.

To access the Work Queue click the **Work Queue** button on the menu bar at the left of the screen




Or, if you are in the Requests domain from the link at the top of the screen:






The Work Queue screen will be displayed:

## Work Queue

 [Edit Work Queue](#)

Borrower		Lender	
Status	Count	Status	Count
<a href="#">Idle / Check Manual</a>	10	<a href="#">New Requests</a>	1
<a href="#">Idle / Auth Manual</a>	2	<a href="#">New Requests Expiring Today</a>	0
<a href="#">Pending &gt; 2 weeks</a>	67		
<a href="#">Pending</a>	72		
<a href="#">End of rota</a>	78		
<a href="#">Terminated</a>	0		
<a href="#">Informed Will Supply</a>	0	<a href="#">Will Supply</a>	0
<a href="#">Conditional</a>	0	<a href="#">Conditional</a>	0
<a href="#">Cancel Pending</a>	0	<a href="#">Cancel Requested</a>	0
<a href="#">New Notes</a>	0	<a href="#">New Notes</a>	0
<a href="#">Shipped</a>	61	<a href="#">Shipped</a>	0
<a href="#">Shipped &gt; 2 weeks</a>	58		
<a href="#">Received</a>	208		
<a href="#">Renew Pending</a>	0	<a href="#">Renewal Requested</a>	0
<a href="#">Overdue</a>	1	<a href="#">Overdue Today</a>	0
		<a href="#">Overdue &gt; 4 weeks</a>	0
<a href="#">Recalled</a>	0	<a href="#">Recalled</a>	0
<a href="#">Returned</a>	227	<a href="#">Returned</a>	0
<a href="#">Circulation Queue</a>	0	<a href="#">Circulation Queue</a>	0
Reports		Reports	
<a href="#">Received List</a>	87	<a href="#">Pick List</a>	1
<a href="#">Received Bookband</a>	87	<a href="#">Shipping List</a>	0
<a href="#">Returned List</a>	227	<a href="#">Shipping Bookband</a>	0

Version: VDX 6.3 (Build 243) [VDXTEST02]
Lethbridge Public Library
© Copyright OCLC 2010. 

## The Borrower Work Queue

Most requests you send to lending libraries will have their status updated automatically as the lender takes Actions to update the request on their side. You may also need to manually update the status of some requests about which you have received emails from non **VDX** lenders who do not have an automated ILL system.

The Borrower side of the work queue shows the requests you may need to manage as the borrowing library.

## Borrower Work Queue Statuses

You will probably want to **check the Work Queue at least once a day** and take action on each request which is at a status requiring action. The work queue categories are:

**Idle, Check Manual** – these are requests which need staff intervention before they can be sent out to the first responder. Common reasons for the Check Manual authorization status are: request is a duplicate, rota is empty (no locations could be found), or that the request is held locally. Look at the request history to find the reason the request needs staff review.

**Idle, Auth Manual** – these are requests which have not yet been authorized and have therefore not yet been sent to potential lenders. You need to perform the Request action and set the authorization status to 'Authorized' to send them to the first responding library on the rota.

**Pending > 2 weeks** – you may wish to check the history of these requests to see why they are taking so long to satisfy. If a request has been with the same lender for a long time, you may want to contact the lender for more information.

**Pending** – These are requests that have been sent to a lender but have not yet been shipped or rejected. This queue includes all the requests in the Pending > 2 weeks queue

**End of rota** – these are requests where every library on the rota has either declined to lend or not responded to the request, allowing it to expire. You need to add locations to the rota for these requests, or complete the request.

**Terminated** – Requests that are no longer needed. A request will stay in this category until the current lender agrees to the cancellation of the request.

**Informed Will Supply**– Requests sent to lenders who do not use an automated ILL system. When the borrowing library gets notification outside of VDX that the item will be shipped, the Informed Will Supply action can be performed manually.

**Conditional** – The lender is stipulating a condition on the loan of this material. You must respond with a Yes or No reply indicating if you are willing to comply with the condition.

**Cancel Pending** – Requests that have been cancelled from the current lender and are waiting for approval of the cancellation.

You should check any **New Notes** which are flagged in the Borrower Work Queue. A request will be counted in “New Notes” when the lender has sent a note that does not update the request status.

**Shipped** – The lender has sent VDX a notification that the item has been shipped. Requests in this category are candidates for the Received action.

**Shipped > 2 weeks** – These are requests that may be lost in the post. The lender notified VDX more than 2 weeks earlier that the item had been shipped and you have not yet indicated that you have received it. You may need to contact the lending library to let them know the situation.

**Received** – Requests which you have acknowledged have been received in your library. Requests in this category are candidates for the Returned action.

**Renew Pending** – Requests for which you have asked the lender for a renewal. The renewal has not yet been granted.

**Overdue** – requests on loan to your library which are past their due date for return - these should be returned or renewed as soon as possible

**Recalled** – requests on loan to your library which have been recalled by the lending library - these should be returned as soon as possible

**Returned** – requests which you have returned to the lending library. The lending library has not yet sent confirmation that they have “Checked In” the item back into their collection.

**Circulation Queue** – This queue is not functional right now, so you can take it off your work queue via the Edit Work Queue link at the top of your Work Queue page.

## Idle Requests – Sending requests to lenders

Borrower	
Status	Count
<a href="#">Idle / Check Manual</a>	4
<a href="#">Idle / Auth Manual</a>	5

Before a request can be sent to potential responders, it must be **Authorized**.

To authorize a single request, you can either retrieve the request from the Idle/Auth Manual or Idle/Check Manual section of the Borrower Work Queue or from a Request search.

### Idle, Auth Manual Queue

914342\*\*Coaldale Public Library  
**On Sunset Boulevard** - the life and times of Billy Wilder  
Sikov, Ed | ISBN: 0786861940  
Status: **Idle** Authorisation: **AutoMediated:AuthManual** Last Action: **REQUEST** Rota: 1 of 3

[Details](#)

From the brief results select the action 'Request' and click the Action button.  
This opens the request up in edit mode and it can now be modified and authorized.

[Request Details](#)

Authorisation Status

Item Format

Our Number 12870

You will note that the Authorization Status is now set to **'Authorized'**.

You may want to review the rota before authorizing the request

See the section on “What to do if VDX didn’t build a rota” for more instructions on this.

The screenshot shows a web interface with two tabs: "Holdings" (selected) and "Found". Below the tabs are two columns: "Available" and "Selected". The "Available" column is empty. The "Selected" column contains a list of libraries: Red Deer Public Library, Calgary Public Library, Black Diamond - Sheep River Community Library, and University of Waterloo, Library. Between the columns are "Add" and "Remove" buttons. To the right of the "Selected" list are "Up" and "Down" arrow buttons. At the bottom, there are "Select All" and "Deselect All" buttons, a search input field labeled "Library symbol or location name:", and a "Search" button.

If your request was not automatically processed because the item was found locally, you should place a hold in your ILS instead of requesting the item through interlibrary loans. If you decide to send the request—if your local copy is “missing” or in “repair”, remember to remove the location(s) from the rota that represent your local location(s) before authorizing the request.

When the request is ready to be sent to a lender, click the **Request** button.

A confirmation screen is displayed showing whether the action was successful:

### Action Successful

Your action has been successful.

Use the [Requests](#) option to search for more requests, or the [Results](#) option to return to the results of the last search.

[Go to next request in the result set](#)

Your request now has a status of **Pending** and will be sent to the first responder on the rota.

From the action message, you can click [Go to next request in the results set](#) to continue authorizing requests.

When you encounter a request that should not be authorized, you can Complete it to remove it from your work queue.

### **Idle, Check Manual Queue**

These are requests which need staff intervention before they can be sent out to the first responder. Common reasons for the Check Manual authorization status are: request is a duplicate, rota is empty (no locations could be found), or that the request is held locally. Look at the request history to find the reason the request needs staff review.

Here are some common messages and what to do about them

- *Local location on rota* – VDX has found a copy in your local library system. Place a hold instead of sending the ILL request.
- *Item not located, rota is empty* – VDX couldn't build a rota. Either do a manual bib search to find lenders or ask your node for help. Also check the section below called, "Why Didn't VDX Build a Rota?"
- *Request is a duplicate* – check to see if there is already a request for this item for the same patron, and if so, complete the 2<sup>nd</sup> request in the Idle Check Manual queue

### **Why Didn't VDX Build a Rota?**

1. Your patron is "unidentified". If your patron is in good standing, update his or her user category to "Patron", then re-request the item using "to be authorized" to get VDX to build a rota.
2. VDX can't find any lenders. Try re-requesting the item using "To be authorized"; if VDX still can't build a rota for you, ask your node for help in find lenders.
3. VDX has found lenders but can't see any available holdings. Sometimes there are lots of libraries that own an item, but all the copies are on loan! If you think this is the case, you can let the request sit in Idle for a few more days, then request + "to be authorized" to see if VDX can build a rota yet. If the item seems too popular, complete the request and let your patron know the ILL request cannot be supplied.

### **Receive Requested Items**

On receipt of an item you should change the status of the request to Received.

You may retrieve the item from an ILL request search if you know the request number, or from the Shipped or Pending section of the Borrower Work Queue. If you have a number of items to receive, it may be advisable to work from the work queue.

From the request results, you can select the action Received document and click on the Action button.

4550 / 4557 \*\* CDL Responder / CDL Requester

**Code blue**

Fisher, Nancy. | ISBN: 0451197674

Status: **Shipped**: Authorisation: **Unread** Last Action: **Shipped-Indication:22 Oct 2012** Rota: 1 of 1

Received

Action

Details

Mark as Read

Print

When you choose the Received action, you can complete the local due date on the form. You may modify it, if needed. You can also enter a Public note which will be sent to the lender or Private Note for your staff use only.

## ILL Request

### Action: Received

Receive

[Reset](#)

**Receiving from** CDL Requester

**Our Number** 4550

**Status** Shipped


**Title** Code blue

**Author** Fisher, Nancy.

**Service Type 1** Loan

**Shipped Service Type**

**Number of Items**

**Received Date**   (e.g. dd/mm/yyyy)

**Due Date** 21 Nov 2012

**Local Due Date**   (e.g. dd/mm/yyyy)

**Local Item Barcode**

**Patron Name** California Digital Library Responder

**Public Note**

**Private Note**

Receive

[Reset](#)

When items have been received they appear in the Received List report, available from the Borrower Work Queue. This report can be inserted into the item and placed on a shelf for the patron. It can also be used to notify the patron by telephone.

Reports	
<a href="#">Received List</a>	2
<a href="#">Returned List</a>	0

The report is in PDF format. It can only be printed once from the Work Queue but can later be printed again if necessary by going to the Reports area of **VDX** and selecting Batch Reruns or by selecting the report type in the request details.

<b>Patron</b> California Digital Library Responder	
<b>Name:</b>	
<b>Phone:</b>	
<b>Email:</b>	
<b>Request</b> 4550	<b>Pickup Location:</b>
<b>No.:</b>	<b>Due Date:</b> 21-NOV-2012
<b>Item</b>	
<b>Barcode:</b>	
<b>Title:</b> Code blue	
<b>ISBN/ISSN:</b> 0451197674	



It can take a couple minutes for a change of status to take effect in **VDX** so be patient if a request's status does not appear to update immediately.



## Return Items to the Supplying Library

Items in the Received section of the Borrower Work Queue are on loan to borrowers at your library and need to have the 'Returned' action taken when they are ready to be returned to the supplying library. This will send a message to the Lending library that the item is being returned.

4560 / 4607 \*\* CDL Responder / CDL Requester

### The prince.

Machiavelli, Niccolò; 1469-1527.; Bondanella, Peter E., 1943- | ISBN: 0192816020700

Status: **Received** : Authorisation: **Processed** Last Action: **Received: 22 Oct 2012** : Rota: 1 of 1

Returned

Action

 [Details](#)

Mark as Read

 [Print](#)

When you choose the Returned action, you will see this screen:

### ILL Request

#### Action: Returned


[Return](#) [Reset](#)

**Our Number** 4560

**Status** Received

**Title** The prince.

**Author** Machiavelli, Niccolò; 1469-1527.; Bondanella, Peter E., 1943-

**Return Date**   (e.g. dd/mm/yyyy)

**Returned Via**

**Insured Amount**

**Insured Currency**

**Public Note**

**Private Note**

[Return](#) [Reset](#)

The Return Date defaults to today's date but can be changed if required.

Each item which is returned is added to the Returned List report which can be printed from the Borrower Work Queue in the same way as the Received List described above.

This report can be inserted in the book when returning it to the lending library. The report is in PDF format. It can only be printed once from the Work Queue but can later be printed again if necessary by going to the Reports area of **VDX** and selecting Batch Reruns or by selecting the report type in the request details.

<b>DO NOT REMOVE SLIP FROM ITEM</b>	
<b>RETURN SLIP</b>	
<b>25-OCT-2012</b>	
<b>Return To:</b>	
<b>Delivery Point:</b>	<b>Responding Library:</b>
CDL Requester <b>ID: CDLQ</b>	CDL Requester <b>ID: CDLQ</b>
<b>Address:</b>	<b>Address:</b>
<b>Phone:</b>	<b>Phone:</b>
<hr/>	
<b>Return From:</b>	
<b>Requesting Library:</b>	
CDL Responder <b>ID: CDLR</b>	
<b>Address:</b>	
<b>Phone:</b>	
<b>Responder Req.4607</b>	
<b>No.:</b>	
<hr/>	
<b>Item Information:</b>	
<b>Requester Req.4560</b>	
<b>No.:</b>	
<b>Title: The prince.</b>	
<b>Item Barcode:</b>	
<b>Items Shipped:</b>	
<hr/>	
<b>Send to:</b>	
<b>DO NOT REMOVE SLIP FROM ITEM</b>	

## End of Rota Requests

If the current potential lending library chooses the action Answer Nonsupply, then your request will automatically be forwarded to the next library on the rota. When no library in the rota is able to satisfy the request, you will find the request in the End of Rota section of the Work Queue.

Borrower	
Status	Count
<a href="#">Idle</a>	<a href="#">11</a>
<a href="#">Idle / Check Manual</a>	<a href="#">6</a>
<a href="#">Idle / Auth Manual</a>	<a href="#">6</a>
<a href="#">Pending &gt; 2 weeks</a>	<a href="#">4</a>
<a href="#">Pending</a>	<a href="#">4</a>
<a href="#">End of rota</a>	<a href="#">7</a>
<a href="#">Terminated</a>	<a href="#">0</a>

There are 2 things you can do with End of Rota requests:

- Complete them to remove them from the Work Queue
- Add more locations and send the request on.

To complete the request, perform a Complete action.

4413 \*\* CDL Responder  
**Homer**  
Steiner, George, 1929- ed.;Fagles, Robert, ed.  
Status: **Idle** Authorisation: **Check Manual** Last Action: **REQUEST** Rota: **0 of 0**  
Complete Action Details Mark as Read Print

You can add a private note if needed and then click the Complete button:

### Action: Complete

**Complete** [Reset](#)

---

#### Request Details

**Our Number** 4413  
**Status** Idle  
**Title** Homer  
**Author** Steiner, George, 1929- ed.;Fagles, Robert, ed.  
**Patron Name** California Digital Library Responder  
**Patron Email address**

---

#### Service Details

**Service Type 1** Loan

---

#### Notes

**Private Note**

**Complete** [Reset](#)

To add more locations to a request's rota and 'bring it back to life' after it has reached End of Rota, select the Request action and click the **Action** button.

4413 \*\* CDL Responder

**Homer**  
Steiner, George, 1929- ed.;Fagles, Robert, ed.  
*Status: Idle Authorisation: Check Manual Last Action: REQUEST Rota: 0 of 0*

**Action** [Details](#)  Mark as Read [Print](#)

You should then go to the Rota Details section of the ILL Request screen and add new locations to the rota. The locations to which the request has already been sent will be shown, but will be faint.

**Holdings** **Found**

**Available**

Saskatoon Public Library

**Selected**

Parkland Regional Library (Lacombe, AB)  
Yellowhead Regional Library  
Saskatoon Public Library

[Add](#)  
[Remove](#)

[Up](#)  
[Down](#)

[Select All](#) [Deselect All](#)

Library symbol or location name:  [Search](#)

After adding more locations, click the **Request** button to send the request to the first location in your new rota.

Note – you may have to do a bib search to find more lenders, or ask your node for help to find more lenders.

## Cancel a request

The Cancel action should be used *only* to cancel the request with the current responder location and move onto the next location in the rota. Use Terminate Request (see next section) to cancel the entire request.

4494 / 4495 \*\* CDL Responder / CDL Requester

**The jester**

Patterson, James, 1947-;Gross, Andrew. | ISBN: 0316602051

Status: **Pending** Authorisation: **Processed** Last Action: **REQUEST:02 Sep 2003** Rota: 1 of 1

[Action](#) [Details](#) [Mark as Read](#) [Print](#)

Select Cancel from the list of available actions and click the Action button.

## ILL Request

---

### Action: Cancel

---

[Cancel](#) [Reset](#)

**Our Number** 4494  
**Status** Pending  
**Title** The jester  
**Author** Patterson, James, 1947-;Gross, Andrew.

**Public Note**

**Private Note**

[Cancel](#) [Reset](#)

You may send a message to the current responder with information about the cancellation. When you are ready to cancel the transaction with the current responder, click on the Cancel button.

If the lending library is another **Alberta public library**, the request will move from a status of Pending to one of Cancel Pending, waiting for the lending library to acknowledge the cancellation.

If the responding library is a non-VDX user, the request will be cancelled immediately.

The request will move on to the next location in the rota and become Pending. If there are no more locations on the rota, the request will be in the End of Rota queue and can be completed.

## Terminate a request

You can terminate a request if the request has not been received. Terminating a request cancels the request with the current responder and does not forward the request the next location on the rota.

Retrieve the item to be terminated from request searches or work queue. Select the Terminate Request action and click on the Action button.

12841 / 12844 \*\* CDL Responder / CDL Responder

**Live and let love** - notes from extraordinary women on the layers, the laughter, and the litter of love

Buchanan, Andrea | ISBN: 9781439191354;1439191352

Status: **Pending**: Authorisation: **Processed** Last Action: **REQUEST:22 Oct 2012** Rota: 1 of 2

Terminate Request  [Details](#)  Mark as Read

The Terminate Request screen will display, allowing you to add a private note about the cancellation.

### ILL Request

Action: **Terminate Request**

[Reset](#)

**Our Number** 12841  
**Status** Pending  
**Title** Live and let love  
**Subtitle** notes from extraordinary women on the layers, the laughter, and the litter of love  
**Author** Buchanan, Andrea

**Click the Terminate button to terminate this request**

**Private Note**

[Reset](#)

Once you click Terminate, a cancellation message will be sent to the current lender. Depending on the protocol being used to correspond with the lender, you may have to wait for confirmation of the cancellation before the request is terminated.

## Complete a request

Requests which will not be progressed any further can be removed from the Work Queue by performing the **Complete** action. There are other reasons that requests can be completed, such as Idle requests that you have decided should not be sent to any responder because it is a duplicate or because it can be supplied locally. You can complete any request that you are certain has reached the end of its lifecycle or that is not pending with a lender (i.e. requests in Idle and End of Rota).



You should not complete requests if they are at a status of Pending as the lending library may still supply the item – requests should only be completed if you are sure no further action will be taken on them.

Complete requests by using the Complete action from the list of available actions.

4401 \*\* CDL Responder

**Homer**

Bloom, Harold. | ISBN: 0791059383

Status: **Idle** Authorisation: **Un-Authorised** Last Action: **REQUEST** Rota: **0 of 0**

Complete

When the Complete screen displays, add a private note if needed and press the Complete button:

**Action: Complete**

[Reset](#)

---

**Request Details**

<b>Our Number</b>	4401
<b>Status</b>	Idle
<b>Title</b>	Homer
<b>Author</b>	Bloom, Harold.
<b>Patron Name</b>	California Digital Library Responder
<b>Patron Email address</b>	

---

**Service Details**

<b>Service Type 1</b>	Loan
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**Notes**

**Private Note**

[Reset](#)



## Renew a requested item

If you want to renew the loan on a requested item which you have received in **VDX** you should retrieve the request and perform the Renew action on it

4550 / 4557 \*\* CDL Responder / CDL Requester  
**Code blue**  
Fisher, Nancy. | ISBN: 0451197674  
Status: **Received**: Authorisation: **Processed** Last Action: **Received: 25 Oct 2012** Rota: 1 of 1

You will be presented with a screen where you can enter the new desired due date.

### ILL Request

Action: Renew

**Our Number** 4550  
**Status** Received  
**Title** Code blue  
**Author** Fisher, Nancy.  
**Due Date** 21 Nov 2012

**Desired Due Date**   (e.g. dd/mm/yyyy)

**Public Note**

**Private Note**

The request will appear in the Renew Pending section of the Borrower Work Queue

If the lender agrees to the renewal, the request will return to the Received section of the Borrower Work Queue with a new Due Date.

## Informed Shipped and Informed Not Supplied

If a lending library which does not use **VDX** or a compatible system informs you by email or phone that they are supplying a request, you need to update the record in **VDX** to stop the request from expiring and moving on in the rota.

Access the correct record from the Work Queue or by searching for it.

Select “**Informed Shipped**” then click the **Action** button.

Similarly, if a lending library which does not use **VDX** or a compatible system has informed you that they are not supplying the item, you should take the **Informed Not Supplied** action on the request. This will move the request on to the next location in its rota.

## How to send a Note

You may sometimes wish to send a message to the lending library, without updating the status of the request.

To do this, choose the Send Public Note action for the request:

12846 / 12839 \*\* CDL Responder / CDL Responder  
**Exploring J.R.R. Tolkien's The hobbit**  
Olsen, Corey | ISBN: 9780547739465;054773946X  
Status: **In Process**    Authorisation: **Unread**    Last Action: **REQUEST-Indication:22 Oct 2012**

Type your note in the Public Note box, and click **Send**.

### ILL Request

---

#### Action: Send Public Note

---

[Reset](#)

**Our Number** 12846  
**Status** In Process  
**Title** Exploring J.R.R. Tolkien's The hobbit  
**Author** Olsen, Corey

**Public Note**

**Private Note**

[Reset](#)

The responding library will see the message appear in their Lender Work Queue.

The same procedure can be used to add a private note to the request by selecting the **Add Private Note** action.

You may also need to send information to your patron concerning the request. This is done via an email message to the email address in the request.

Search for and display the appropriate request. Select the **Send User Alert** action and click the Action button.

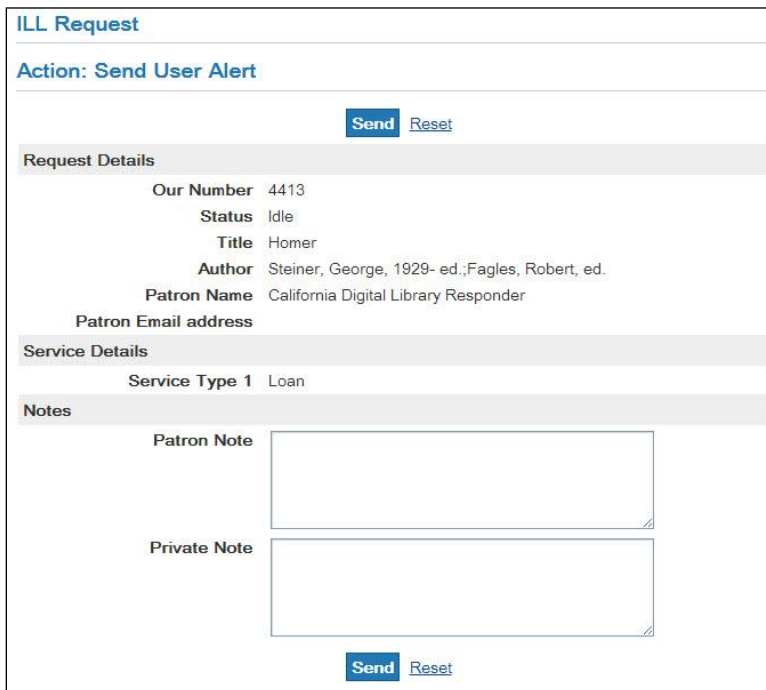


4413 \*\* CDL Responder  
**Homer**  
Steiner, George, 1929- ed.;Fagles, Robert, ed.  
Status: **Idle** Authorisation: **Check Manual** Last Action: **REQUEST** Rota: **0** of **0**

Send User Alert Action Details Mark as Read Print

You will be presented with a screen containing request details and allowing you to enter the patron note. When you have completed the note, click on the Send button.

Note – “Send User Alert” only works if the patron has an email address in his or her user record.



**ILL Request**  
Action: **Send User Alert**

Send Reset

**Request Details**  
Our Number 4413  
Status Idle  
Title Homer  
Author Steiner, George, 1929- ed.;Fagles, Robert, ed.  
Patron Name California Digital Library Responder  
Patron Email address

**Service Details**  
Service Type 1 Loan

**Notes**

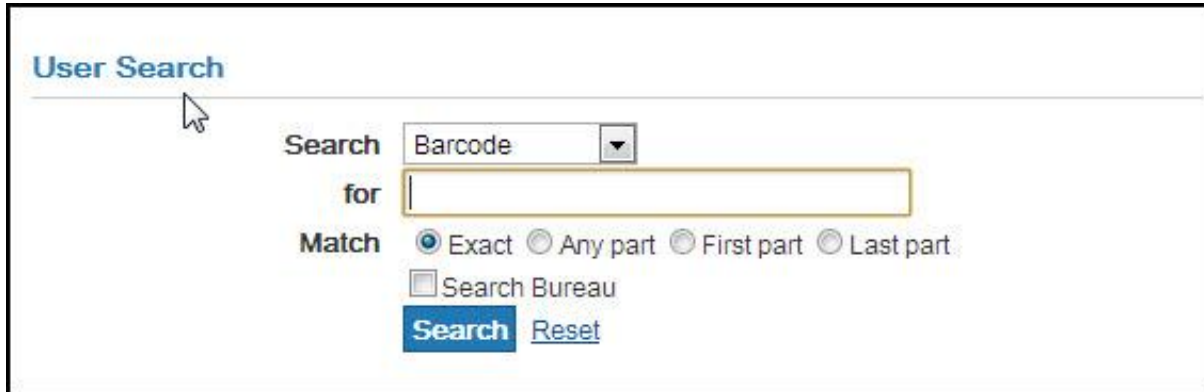
Patron Note

Private Note

Send Reset

## Searching for User Records

Click the **User** button in the left-hand menu bar to display the User Search screen:



Enter your patron’s barcode, or select another option from the dropdown list.

NOTE – barcodes need your region’s prefix in front of them if you do an “exact” search (e.g. ALCA-218170023000000). Otherwise, you can type in the barcode without the prefix, and select “Any part” or “last part”.

Select the appropriate radio button from the **Match** menu:

Exact	Retrieves records matching your search terms exactly, but is not case sensitive.
Any part	Retrieves matches including your search term in any part of the string.
First part	Retrieves matches including your search term at the beginning of the string.
Last part	Retrieves matches including your search term at the end of the string.

Click on the **Search**. Your user record will be displayed.

<b>User Details</b>	
User ID	170
Barcode	CDLQ
Surname	California Digital Library Requester
Category	Bureau System Administrator
Joining Date	28 Aug 2003
Location	CDL Requester
Banned in VDX	No
Has Presigned Copyright	No
Default Pickup Location	CDL Requester
Admin Home Action	Request Work Queue
 <a href="#">Edit</a>	

## Create new users

From the Users menu, select Create.



You can then enter the user information you need for request management. **VDX** requires a barcode, First and Surname, location and category. Addresses can be added once the user record is saved.

**Save**

**Barcode**

**Password**   Update Password

**Confirm Password**

**Alternative Barcode**

**First Name**

**Surname**

**E-Mail**

**Category** Patron

**Join Date**  (e.g. 1 Sep 2003)

**Expiry Date**  (e.g. 1 Sep 2003)

**Location** Coaldale Public Library

**Banned In VDX** No

**Has Presigned Copyright** No

**Default Pickup Location**

**Admin Home Action**

**End User Home Action**

**Note/Stat 1**

**Note/Stat 2**

**Note/Stat 3**

**Note/Stat 4**

**Note/Stat 5**

**Note/Stat 6**

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