Glossary

The following are terms commonly used in VDX.

A

Acknowledge: Requests or incoming messages that have not been 'reviewed' by the VDX administrator have the authorisation status of to be acknowledged. The status of these requests/incoming messages are updated to acknowledged once they have been viewed.

Action: The act of changing the status of a request record. An action changes the status of a request

Address Type: The purpose assigned to a user's address/es - e.g. Billing Address, Delivery Address. Can be different addresses for one user.

Allocate: To 'lock' a request to a certain ILL operator in order to process them.

ANSI/NISO: American National Standards Institute/ National Information Standards Organization

ARIEL: Software from Research Libraries Group (RLG) allowing documents to be scanned and transmitted to other Ariel Workstations via e-mail or FTP.

ARTEmail: Method of sending requests to BLDSC in which request is typed in ARTE format and saved as an ASCII plain text file. This is text is then pasted into the body of an e-mail message and sent to BLDSC.

Attribute sets: A collection of attributes (e.g. BIB-1) registered with by the Z39.50 Maintenance Agency. An attribute is used to describe how a search terms is used when searching a target database.

Authentication Service: Used to check user login details. Details can be checked against the VDX system or against a remote database, for example a Library Management System, that contains user details. Can be one just one option for all users, or can be a drop down list where the user selects their option.

Authorise: A change of authorisation status performed automatically or by the ILL administrator, if the request satisfies certain criteria. Once a request has been authorised it can be picked up by the background driver and sent to the first potential responder on the rota.

Auto-authorisation: The change of authorisation status performed automatically if a request satisfies certain pre-determined criteria e.g. mandatory fields are present.

Autoforwarding: The automatic forwarding of a request to the next location on a rota if it cannot be satisfied by the first location.

Automatic Expiry: Configuration of VDX to select requests that have expired and take appropriate protocol specific action i.e. send status error to responder.

Auto-mediation: Steps in the requesting process that have been configured to be checked and passed on automatically to the next stage of the process, provided a request meets certain criteria.

Available databases: All databases that are available for the user but not currently selected. (VDX Web Client only)

B

Background Driver: Program running on VDX that checks for newly authorised requests and incoming Requests and ILL messages.

Banned: Status that prevents a user from logging on to the system and placing requests etc. An anonymous search is still available to banned users.

Barcode: Unique code given to all VDX users and used to log in to the system. Can be letters and/or numbers. Often an existing ID is used - e.g. library card number etc. Used with password.

BL SED: The British Library Secure Electronic Delivery service.

Boolean operators: The use of the conjunctions (AND, OR, NOT) to join terms when creating a search query. Used within the Criteria Tree tool to add new search criteria to searches.

Borrower: Any location that places requests via VDX. Locations can be either responders (i.e. they do not make requests, only supply them), or requesters (i.e. they do not supply requests, only make them), or they can be both a requester and a responder (i.e. they make requests and supply them). Also known as the Requester.

Bulk Action: Allows the same action to be performed on a group of requests.

C

Cancel: An action that causes the system to send a request to the current responder location to cancel the request.

Catalogue: Database resources that can be accessed via VDX. Searches can be carried out on them, and requests made for items found on them.

Centralised model: VDX implementation model. All locations within the service log on to a central system and place requests within a single database. This model uses an internal ISO based protocol driver - the LASER driver, that processes requests in the background. This is usually run with a virtual union catalogue.

Check-in: An action performed on a request by the responding location to confirm that a returned item has been received.

Client: Software that runs on a user's computer that is used to communicate and access services on a remote server.

Close Coupled Configuration: A scanning configuration in which the ARIEL/JEDDS scanning software and the VDX client are on the same PC.

Combo box: Used to describe a selection box i.e. to select new type of search.

Complete: An action which causes the completion date to be added. which records the end of request processing.

Control: A field in a record.

Copy: An item that can be requested via VDX that does not have to be returned. Usually a paper or electronic copy for example, a journal article or a chapter from a book.

Copy of Allocate: To 'lock' a request to a certain ILL operator in order to process them.

Copy of ILL Administrator/s: Varying levels of access/privilege within VDX assigned to staff performing tasks related to the processing of requests and the maintenance of user records. There can be multiple, varying levels configured for staff working on the Windows Admin. Client. The Web Admin. Client has a more limited choice of privilege, but still has different levels of a access available.

Copyright: Country-specific copyright legislation applies to all requests for non-returnable material. End-users must either pay a copyright fee (i.e. for copyright cleared material) or be bound by 'fair dealing' agreements which will usually allow for limited copying of a document for private study, research or review.

Current databases: All databases in the User Search Profile that are selected for use (WEB client only)

D

Databases: Database resource that can be searched via VDX - e.g. an online library catalogue

Dependent search: A search made to select values to add to a control whilst inputting/editing data

Details: The most fullest on-screen view of a record.

Distributed model: VDX implementation model. Allows peer-to-peer interaction between locations and does not rely on a centralised service. Service levels can be established independently between users institutions.

DocFetch: The DocFetch process allows document delivery directly to the end user via an Emailed URL.

Docfind-requester: An automatic process for the benefit of the requester location. This process can be configured to validate the request before transmission and automatically compile a list of potential suppliers for the rota. This is based on items located via Z39.50 searching, library groupings and other Requester defined filtering and sorting rules. The holdings records of the remote supplier databases are checked, and if the requested item is located, the supplier location is added to the rota. Configured in Windows Admin. Client.

Docfind-responder: Automatic process for the benefit of the responder location. Checks whether the requested item is held by the Responder and is available for the Requester. Can validate the request against local profiling rules and service attributes, and be configured to automatically send back suitable ILL messages to the Requester dependent upon the circulation status of the requested item. Can automatically re-route requests that cannot be directly satisfied by the current responder, but can be satisfied by other ILL departments internal to the current institution or consortium. Ability to automate the role of intermediary or broker between external requesters and other external suppliers or brokers such as OCLC. Configured in Windows Admin. Client.

Document delivery: A service in which the library delivers books, articles, or other materials to an end-user. Documents may be supplied in hard-copy or electronically from the libraries own stock or via inter-library loans.

Domain: An area of information within VDX e.g. Requests domain, User domain.

E

EARL: Electronic Access to Resources in Libraries. The EARL Consortium for Public Library Networking, offers (British) public libraries a web presence.

Edit box: An input field on an online form. New data can be entered or existing data edited.

Electronic document delivery: The transmission and supply of items electronically.

End User/s: The basic level off access/privileges within VDX. Can search and place requests or 'requests for requests' depending on privilege assigned. Can only access the VDX system through the Web Client.

Explain: A service specified within the ANSI/NISO Z39.50 Information Retrieval Standard (version 3) that allows a client to discover information about a server e.g. available databases, supported attribute sets and record syntaxes.

F

Field Details: Collective term to describe the data within a domain. Given at the end of each chapter and includes details of the requirements and options within each field.

Filter: Function allowing search to be refined by searching on specific fields within a record.

Folder: A 'window' into which the results of other searches can be stored.

Forward: To transmit a request to the next location on a routing rota.

G

GEDI: Group on Electronic Document Interchange: An international agreement for the format of image documents to be exchanged among different computing environments. This format is used by Ariel systems and consists of a multipage TIFF document and a GEDI header. The GEDI headers allows the program or person who receives the document to associate the document with the request that ordered it.

H

Hitlist: The format that search results are presented in VDX. This can be a search of external databases for resources, or an internal search for users or locations etc.

Hybrid model: VDX Implementation model. A mixture, in any proportions, of the centralised model and the distributed model. Can be tailored to client-specific requirements.

I

Icons: An image on a tool bar providing a short-cut to a menu option.

ILL Administrator/s

Varying levels of access/privilege within VDX assigned to staff performing tasks related to the processing of requests and the maintenance of user records. There can be multiple, varying levels configured for staff working on the Windows Admin. Client. The Web Admin. Client has a more limited choice of privilege, but still has different levels of a access available.

Incoming requests: These are request messages that come to you from other institutions or locations.

IPIG: ILL Protocol Implementers Group.

ISO: International Standards Organisation: a worldwide federation of national standards bodies from around 130 countries.

L

LDAP: LDAP is a protocol for obtaining an organisation's data. VDX can authenticate users against an existing LDAP service.

Lender: Any location that accepts requests via VDX. Locations can be either responders (i.e. they do not make requests, only supply them), or requesters (i.e. they do not supply requests, only make them), or they can be both a requester and a responder (i.e. they make requests and supply them).Also known as the Responder.

Links: Ability to move from one record to related records.

List view: A view providing a list of brief records.

Loan: An item that can be requested via VDX but must be returned. Usually a hard copy, e.g. monograph or video tape etc.

Location: Any site that requests and/or supplies material via VDX. Any site that is registered with a VDX system.

Location Record: VDX record where details of all locations and their service details are held.

Lock: A request can be locked to allow a user to work on a record without other users being able to access it.

Log messages: Messages displayed in the 'history' (audit) section of a request: validation, user alerts, errors.

Logon: Oracle login window allowing user to connect to VDX

Loose Coupled Configuration: A scanning configuration in which the ARIEL/JEDDS scanning software and the VDX client are on different PCs.

M

MIME: Multipurpose Internet Mail extensions: The standard for attaching non-text files (such as graphics, spreadsheets, word processor documents, sound files, etc.) to email messages.

Modify: Edit record

Multi-media: Used within VDX to describe 'object' that can be delivered to the end-user electronically

N

Notes / Note field: Notes about a request can be made and attached to the request in the Note field. The Note can be set to be available just to the Requesting Location or to the Responding Location too. Can also be visible to the End User if required. Options can be set in the Web Client.

O

OCLC: Online Computer Library Center, inc: a not for profit membership organisation with over 40,000 libraries in 82 countries and territories around the world.

OCLC Policies Directory: The repository of lending and copying policies of libraries participating in WorldCat Resource Sharing.

Outgoing requests: These are requests that are sent out from your location to other locations or institutions.

P

Password: Linked to barcode and required by all VDX users. All privilege levels can change their own password if VDX has been configured to allow this function.

Patron: VDX user.

PDF: Portable Document Format. The native file format for Adobe Systems' Acrobat, for representing documents in a manner that is independent of the original application software, hardware, and operating system used to create those documents. A PDF file can describe documents containing any combination of text, graphics, and images in a device-independent and resolution independent format.

Permissions: The authority granted to users to view, edit or modify records.

Pickup Location: Location at which a user may collect requested item.

Protocol: The rules of an agreement which specifies the content of ILL messages and procedural rules for exchanging them e.g. ISO 10161 is a major ILL protocol.

Protocol driver: This enables ILL messages to be transmitted from one computer to another according to the rules of a specific ILL protocol. VDX uses ISO 10161, LASER (VDX style driver) and Email.

Pulldown menu: A menu of further options that is accessed by clicking on the required option on the menu bar at the top of the screen.

R

Recall: An action by a responder to request the return of an item on loan to a requesting library.

Receipt: An action by a responding location to record receipt of an item that has been returned by a requesting location.

Renew: An action by a requesting location to responding location requesting extension to the loan.

Re-order: Arrange locations on rota in different order. Displayed as icons on the ribbon bar.

Request Details: Format used to place requests via the VDX system. The form appears with bibliographic details automatically in place when a request is placed from a search result, or it can be accessed as a blank form and filled in manually.

Requester Location: Any location that places requests via VDX. Locations can be either responders (i.e. they do not make requests, only supply them), or requesters (i.e. they do not supply requests, only make them), or they can be both a requester and a responder (i.e. they make requests and supply them). Also known as the Borrower or the borrowing location

Responder Location: Any location that accepts requests via VDX. Locations can be either responders (i.e. they do not make requests, only supply them), or requesters (i.e. they do not supply requests, only make them), or they can be both a requester and a responder (i.e. they make requests and supply them). Also known as the lender or lending location.

Rota: A list of Responders that can be created in VDX. The list can be ordered to criteria set by the Requester - for example cheapest or quickest Responder first etc. Can be configured to be generated automatically or can be created manually.

Routing: The forwarding of a request to a succession of responders on a rota.

S

Saved List: Used in bibliographic searching to save specified retrieved records in a temporary list. Items on the list can be printed, emailed or requested.

Secondary Resources: Database resources that can be selected for the Advanced Search within VDX Web.Client only.

Servers: The computer or software that provides services to other computers known as clients.

Service Details: Information on the type and level of service offered by each location.

Shipped: An Action by the responding location to record shipping of the item to the requesting location. Status of a shipped item.

Simple Search: VDX key word search of targeted databases via VDX Web Client only. Also known as the standard search.

SIP: Standard Interchange Protocol as defined for 3M self-check terminals. This provides a standard interface for communicating with circulation systems. VDX implements both SIP 1 and SIP 2 protocols.

Special instructions: Client Instructions entered in the request. If present, the system can be configured to 'override' auto-authorisation and force manual authorisation.

Standard Search: VDX key word search of targeted databases via VDX Web Client only. Also known a simple search.

Status: The position of a request at a given point in the VDX system request cycle. An action is used to change the status of a request.

System Administrator: The highest level of privilege/access within VDX and responsible for the initial setting up of VDX within an organisation. Can alter/configure all none hard-coded options. Can access all the privileges of the ILL Administrator and the End User.

T

Target: Databases or other resources and also locations that are set up to be searched and requested from via VDX.

Terminate: An action that causes the system to send a request to the current responder location to cancel the request and marks the request as terminated so that it does not move to any further rota locations.

TIFF: Tagged Image File Format,: A standard method of defining information about an image or group of images contained in a file.

U

Unauthorise: Option in Requests to give request the authorisation status of 'unauthorised'. It can only be used with requests that have not yet been authorised.

URL: Universal record Locator: used to locate document held on requester's or responder's system.

User Alerting: If configured, VDX informs a user when an action has occurred on their ILL. The user is contacted via e-mail using a specific e-mail format. E.g. if the RECEIVED action occurs, a suitably worded e-mail informs the user the requested item is available.

User Category: Assigned to each user to determine their level of access - e.g. ILL Administrator and End User are User Categories. Can be set up in the Web Client.

User Details: Record containing details of VDX users including end-users, ILL operators and administrators.

User Group: Privileges within VDX can be set at a group level, then users can be assigned to a group. User Groups are configured in the Windows Client.

User/s: Any person using VDX.

V

Validation errors: Errors that have been generated by the auto-mediation process.

VDX Web Admin. Client: The interface used by ILL Administrators to search and request items. Also used to perform routine processing and maintenance tasks for records connected with your own location/organisation.

VDX Windows Admin. Client: The interface used by ILL Administrators and System Administrators. End Users don't usually have access to this interface. The whole range of administrative tasks can be performed in this interface, with customised levels of access in place as locally required. The System Administrators use the Windows Admin. Client to make changes to the system e.g. adding new user groups and also to add to and amend all configurable options.

W

Wildcard: A symbol, i.e. "%" which acts as a variable within a search term.

WorldCat: Provides access to the holdings of OCLC's WorldCat global catalogue, via a simple web interface.

Z

Z39.50: An ANSI/NISO Information Retrieval protocol which allows client applications to query databases on remote servers, retrieve results, and perform other retrieval related functions.

ZPortal: VDX application normally used by end users. It enables 'one search' access to a range of mixed resources such as journals, online databases, library catalogues, the web, the organisation's own intranet.