

VDX Quick Reference Guide -- Table of Contents

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VDX—Quick Reference Guide

1. Websites involved with VDX:
 - a. <https://alberta.vdxhost.com/vdx/> access VDX
 - b. www.talonline.ca access TALOnline
 - c. www.tracpac.ab.ca access TRACpac
 - d. www.peacelibrarysystem.ab.ca/content/VDX access PLS Training Resources
 - e. www.illalberta.ca access ILLO/VDX resources
(log on using VDX login & password)

2. **Search TRAC first** for desired item; **only use VDX if an item is not available through TRAC.** Check in Polaris to make sure the patron's library card has not expired and that they don't have any charges over \$9.99. These issues must be cleared up before a VDX request can be placed for them.

3. **Login to VDX**
 - a. <https://alberta.vdxhost.com/vdx/>
 - b. Your Barcode and Password have been provided to you by PLS.

4. **User Record**--search for a user's (requester's) record BEFORE placing a request. Click the User link at left side of screen.
 - a. In the Search drop down menu, select to search for the user by barcode or by surname.
 - b. If you select "barcode" you must input exactly what you initially typed when you created the patron's barcode, e.g. "AGP-barcode".
 - c. Click Search.
 - d. If the User record exists, click Details to open it.
 - e. Check that the Category is set to Patron (or Staff). Click Edit at the bottom of the User record to make changes if necessary.
 - f. Make all changes necessary to the record, then click Save.

5. **Create a User Record** if one doesn't already exist, BEFORE placing a request.
 - a. Patron barcode: "AGP-" must precede the full patron barcode.
 - b. First name, Surname.
 - c. Email address if patron wishes to be contacted this way.
 - d. Category: Patron (or Staff).
 - e. Enter "join date" (date you create the User record).
 - f. Click Save, and then edit the record to add the patron's phone number:
 - i. Click Edit at bottom of User record.
 - ii. Click New Address link.
 - iii. Near the bottom of the address screen, enter the phone number.
 - iv. click Save and Close.
 - v. click Save.

6. **Delete a User Record** if you discover a duplicate User record, or have created a user record with a barcode error, it is not possible to edit the barcode. To delete a User record:
 - a. Click Edit at bottom of User record.
 - b. In the Last Name field, delete the user's last name and type in DELETE (in capitals).
 - c. Click Save.
 - d. Make sure any requests attached to the user record have been "Completed".
 - e. VDX periodically purges all user records with a last name of DELETE.

7. **Request an Item**
 - a. **Searching** -Click on the **BibSearch** link on left side of screen. This brings you to the Advanced Search screen
 - i. Set Current Profile to ALL[Shared] to conduct the most extensive search.
 - ii. Search by title, author, ISBN, etc. by clicking the dropdown menu for each Field.
 - iii. Using quotation marks ("") around your search terms allows VDX to search these exact words, or phrase, in this order, rather than each word separately.
 - iv. Click Search.
 - v. When results display, click on the TRAC link near the top of screen—this will re-sort the list putting all the TRAC-held items at the top so you can confirm that none are available in TRAC.
 - vi. Then click an item's DETAILS link first to confirm that there are available copies. Refer to the Inclusions List to determine if the owning library will lend the item.
 - vii. Click Request at top right of screen. (Make sure item selected for request is the correct format wanted, book, TB, etc. No Electronic Resources can be requested.)

 - b. **The ILL Request Screen**
 - i. The Authorisation Status field should say "**To be Authorised**".
 - ii. Do nothing with the rota.
 - iii. Scroll down to Patron Details and attach the patron to the request by typing in the patron's barcode (without the AGP-); Authentication Service can be left at Grande Prairie Public Library; click the Validate button. (Ensure patron has a status of PATR)
 - iv. Click Request at bottom screen. VDX will auto build the rota.
 - v. **To Be Authorised + patron status PATR = auto built rota**
 - vi. In a few minutes, the request will go into Idle in your Work Queue, to be Authorised. Read section **10. a.** on page 4 to perform the Authorisation step.

 - c. **Create a Request** if the item does not exist in VDX.
 - i. Go to the Requests link on left side of screen; click the Create link at top of page.

- ii. Select the Item Format from the drop down menu.
- iii. At minimum, a title is required. Fill in as much information as possible. An ISBN is most helpful.
- iv. Scroll down to Patron Details and attach the patron to the request by typing in the patron's barcode (without AGP-), and click the Validate button.
- v. Click Request at bottom of screen.
- vi. In a while, the request will go into Idle in your Work Queue. Email or call Kerri Twigge at GPPL (lclarke@gppl.ca or ill@gppl.ca, 780-357-7468) to request further searching. Leave request in Idle for now.

d. Add a Note: You can go back into an item and add a public note (lender and you see) or a private note (only you see). Retrieve the item and select Send Public Note or Add Private Note, click the Action button, type the note in the corresponding box, and click Send/Add.

8. Cancel an Item

- a. If the item is in the Work Queue, IDLE, select Complete from its drop down menu and click the Action button; type an explanatory note, then click the Complete button. This will remove the request from your Work Queue.
- b. If the item is in the Work Queue, PENDING, select Terminate from its drop down menu and click the Action button; insert an explanatory note, then click the Terminate button.
- c. If the item is in the Work Queue, SHIPPED, it cannot be cancelled. When it arrives, select Received from its drop down menu, click the Action button, and click Received. Then select Returned from its drop down menu, click the Action button, select a delivery method, and click Returned. Send the item back to its owning library (not to GPPL).

9. Renew an Item

You must ask the lending library's permission for a renewal. Find the item in your Work Queue—Received and select Renew from the item's drop down menu and click Action. Select a desired due date, add a note if necessary, and click Renew. The item will now be in your Work Queue—Renew Pending. When the lending library responds, the item will move back to your Work Queue—Received. Check the item's Details to see if the library has allowed the renewal or not. Advise your patron.

10. The Work Queue and Idle

CHECK YOUR WORK QUEUE DAILY. Requests cannot move forward without your mediation. In the BORROWER column there are two types of IDLE fields—Idle/Check Manual and Idle/AuthManual. Click on their numbers to view the items involved. When

you open the item records, there are three main Authorisation messages you may see, for each, do as follows:

- a. **AutoMediated: AuthManual:** Once you've submitted a request, VDX checks to see where the item is available, automatically builds a rota, and then returns the request to Idle with a status message of "AutoMediated: AuthManual". This is normal. You now push the request through.
 - i. In the item's drop down menu, select Request and click the Action button.
 - ii. The Authorisation Status should now say "Authorised".
 - iii. Scroll down to check Rota Details, the rota should be filled in.
 - iv. For AV materials check ILL Inclusions list, as VDX doesn't always filter out libraries which do not loan certain formats.
 - v. Check patron information – full barcode, and status PATR
 - vi. Click Request.
 - vii. In a few minutes, the request should jump from Idle/AuthManual to Pending, which means the request has been forwarded to the lending library(s).

- b. **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" authorisation status are: request is a duplicate, rota is empty (no locations could be found, no items currently available), or the request is held locally. Look at the request history to find the reason the request needs staff review.
 - i. If the item format is available in TRAC, place a TRAC request for the patron.
 - ii. Remove the request from VDX by returning to the Results list and use the drop down menu to select Complete and hit the Action button. If you wish to include a note as to why you're removing the request, do so, then click Complete.
 - iii. Rota is empty – check in BibSearch to see if there are copies available for loan. Check the ILL Inclusions list as well, especially for AV material. If there are no holdings, or the format prohibits the loan, Complete the VDX request, and let your patron know the request cannot be supplied.
If there are loanable holdings, but all copies are in use or on hold, leave the request in your Idle queue with a private note saying copies all in use. Check for availability, and request using **To Be Authorised** to ask VDX to build the rota when items show on shelf. If patron needs the item in a hurry, or if the item is too popular/too new/on order, Complete the request, and let the patron know it cannot be supplied at this time, but can be requested at a later date.

11. The Work Queue and New Notes:

- a. Occasionally, you will receive a message on an item. In the Work Queue, in the New Notes field, click on the number to display the item(s) with messages. Go to the item's Details and scroll down to read the Public Notes field.
- b. To reply to a note, use the item's drop down menu to select "Send Public Note". Click the "Action" button. In the Public Notes field type your reply and hit submit.

12. The Work Queue and End of Rota

End of Rota means VDX has run through the Rota and not been able to supply the item. In Details, check the Public Notes field, and the request History for an explanation.

- a. Sometimes this is because there are no holdings to fill the request – missing, non-circ, format not loanable, etc. If item is not able to be supplied, contact the patron and advise that you cannot get the item for them.
- b. Sometimes the request will go to End of Rota because all copies were in use, or the request expired before being processed. Check BibSearch for loanable, on shelf holdings, then re-request the item by manually filling in the rota, and authorising the request.

13. Receive an Item

- a. Go into your Work Queue and locate the item.
 - i. It will either be in Pending or Shipped.
 - ii. Alternatively, you can search for the item using the Request link on the left side of the screen. Scroll down to "Other Fields", enter the Title or ILL Number, and click search.
 - iii. In the Results list, use the item's drop down menu to select "Received".
 - iv. Click the "Action" button.
- b. ILL Receive Screen
 - i. If the item was received damaged, type the damage information in the Public Notes field and indicate whether you are still checking the item out to the patron or returning it to the owning library.
 - ii. Click Receive.
 - iii. Return to the Results list and click the item's Details link; scroll down to Patron Details to find who the item is for.
 - iv. Contact the patron to come pick up the item—they must pick it up within seven days—do not hold it longer.
 - v. At the bottom of your Work Queue under Reports, if you wish, you may print off the "Received Bookband" to attach to the book for the patron.
- c. Polaris Checkout—check the item out to the patron using Polaris:
 - i. At checkout, scan the patron's barcode, and then scan the item's barcode. A message may pop up saying, "Invalid barcode. This barcode is not defined. Do you want to continue?" Select Yes.

- ii. Then another message will pop up saying “The item is not linked to a record and cannot circulate. Would you like to create a record ‘on the fly’?” Select Yes.
- iii. Fill in the fields: Title; Author; Call #--**typing OTF before the call number**; Free Text Block--“This is an interlibrary loan from fill in name of owning library”; click a checkmark into the box that says “set OTF block”; select the Material Type = “Interlibrary loan”. (This will stop others from placing a hold on it and will make sure your VDX stats get counted.)
- iv. Complete your regular checkout procedure.

14. Return an Item

- a. Polaris Check-in—check the item in using Polaris:
 - i. At check-in, a message will pop up saying, “Item is blocked...Do you want to continue with this operation?” Select Yes to complete the check-in.
 - ii. Then to delete the on the fly record, go to Cataloguing→Item Records and search for the item record by barcode.
 - iii. Double click on the item line when it appears.
 - iv. In the opened item record, click the X (for Delete) in the toolbar.
 - v. A “Last Copy Option” message will pop up; select Delete.
 - vi. If you forget to delete the on the fly record, Yellowhead Regional Library routinely purges (for all of TRAC) on the fly records that have an item status of In.
- b. In VDX, go into your Work Queue and locate the item.
 - i. It will be in Received (if you remembered to do step 13a when the item arrived). Otherwise, you can search for the item using the procedure in step 13a(ii).
 - ii. In the Results list, use the item’s drop down menu to select “Returned”.
 - iii. Click the “Action” button.
- c. ILL Return Screen
 - i. Use the “Returned Via” drop down menu to select your method of returning the item, e.g. mail, government courier, van run.
 - ii. If your patron damaged the item, use the Public Notes field to advise the owning library and ask them to advise you of the replacement cost.
 - iii. Click Return.
 - iv. In the reports section at the bottom of your Work Queue, you may print off a Return Slip from the Return List queue. Include this with the original paperwork sent with the item when returning.
 - v. Send the item back to the owning library (not to GPPL).

15. Lending Your Items in VDX

- a.** You should never see anything on the Lender side of your Work Queue in VDX. If you do, please contact Lisa Clarke at GPPL, 780-357-7468, lclarke@gppl.ca , and she will deal with it.
- b.** Polaris Request Manager Report
 - i. Grande Prairie Public Library “brokers” all requests received for PLS member libraries’ items from libraries outside of TRAC.
 - ii. Grande Prairie Public Library will place holds for your items in Polaris, which will show up in your Polaris Request Manager report, which you run each day.
 - iii. When it is a VDX request, the Patron column will contain the name of a non-TRAC library, not a patron.
 - iv. When you pull the item from your shelf and scan it through check-in before sending it, you will be advised to send it to GPPL.

16. Who to Call if you have VDX questions

- a.** Grande Prairie Public Library: Lisa Clarke--ILL Department; (780) 357-7468 direct line; ill@gppl.ca ; or lclarke@gppl.ca
- b.** Peace Library System: Katherine Wiebe, (780) 538-4656, x 103; kwiebe@peacelibrarysystem.ab.ca
- c.** Chinook Arch Regional Library System: Jennifer Latham and Trevor Hatfield—ILL Department; toll free 1-866-941-9262; illquery@chinookarch.ca

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