Interlibrary Loan
with external Non-INFO libraries

Definition:
External (Non-INFO) Library is defined as any library, public or non-public, that is not an Ontario public library.

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Generic Script information was adapted from RACER documentation, with permission, from S. Mcgillvray, OCUL VDX Project Manager, Ontario Consortia of University Libraries
1. **General Overview of VDX messaging protocols**

The VDX vendor and various systems using VDX continue to do interoperability testing between VDX and other ILL management systems and communication tools. Interoperability testing is defined as the ability of software and hardware on different machines from different vendors to share data. In our situation that means that VDX can send and accept requests from libraries that use Generic Script and ISO compliant ILL systems. Note that there can be interoperability issues even in ISO to ISO messaging because not all locations using ISO systems have set up the ISO messaging standard the same way.

For VDX to send a request to an external library or supplier, the external location must be using a system that has proven operability with VDX and must have a VDX location record with a unique identification code. This location record will indicate the external location’s “interloan status” as a responder and will also include information on how VDX sends and receives messages between INFO and the remote system.

There are 3 messaging protocols currently in use with VDX:

1. **LASER**
   - This is internal VDX messaging protocol between INFO libraries.
   - For example:
     - Ajax with Middlesex County or with Thunder Bay

2. **ISO**
   - This is messaging with external locations using ISO protocol systems.
   - For example:
     - Ajax with Archives of Ontario whose AMIS system is ISO compliant
     - Ajax with Library and Archives Canada whose NAVIS system is ISO compliant
     - Ajax with McMaster University, an OCUL library using VDX
     - Ajax with Universite de Montreal, a CREPUQ library using VDX
     - Ajax with Saskatchewan Institute of Applied Science, using VDXHost

3. **GENERIC SCRIPT**
   - This is messaging with external locations that are using Generic Script protocol systems. For example:
     - Ottawa with AC, Calgary Public Library
     - Ottawa with NFSM, Memorial University of Newfoundland

For a summary of the various types of external locations in VDX and what their communication status is, refer to the chart “Communication Status of VDX with Other Systems” on the website at: [http://www.sols.org/resourcesharing/INFO/vdx/using_vdx.htm](http://www.sols.org/resourcesharing/INFO/vdx/using_vdx.htm)

In VDX, you cannot have two protocols for the same location (i.e. receiving requests via one method such as ISO or email protocol and sending requests via a different method such as GS). If this accidentally happens it results in a request with a mixed protocol and can potentially jam the system. So it’s very important that the messaging method used by a location to send a request to VDX matches the protocol that has been entered in that location’s record in our VDX system.
1.1 DocFind rota generation and Expiry Period

Currently **ONLY** the INFO libraries have been added to the list of databases that the DocFind processor searches in order to automatically build rotas. **There are no locations external to INFO which can automatically get added to a rota.**

**ALL external locations have to be manually added to the rota by an operator, either on the Rota screen, or by ticking the Add to Rota box on the Main ILL Request screen.**

Turnaround time for requests sent to external locations varies depending on the communication protocol used and their geographic location, as follows:

<table>
<thead>
<tr>
<th>Responder</th>
<th>Protocol / Communication Method</th>
<th>Number of Minimum Expiry Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>INFO sites</td>
<td>LASER (local system ISO)</td>
<td>4</td>
</tr>
<tr>
<td>OCUL sites using VDX</td>
<td>ISO</td>
<td>10</td>
</tr>
<tr>
<td>CREPUQ sites using VDX</td>
<td>ISO</td>
<td>10</td>
</tr>
<tr>
<td>Library and Archives Canada</td>
<td>ISO</td>
<td>10</td>
</tr>
<tr>
<td>CISTI</td>
<td>ISO</td>
<td>4</td>
</tr>
<tr>
<td>CISTI Global/Link</td>
<td>ISO</td>
<td>90</td>
</tr>
<tr>
<td>CISTI (Monographs)</td>
<td>ISO</td>
<td>4</td>
</tr>
<tr>
<td>Canadian VDX Host sites</td>
<td>ISO</td>
<td>10</td>
</tr>
<tr>
<td>Other external locations</td>
<td>Generic Script</td>
<td>30</td>
</tr>
</tbody>
</table>

Please note that the chart above only applies to the locations as responders. The number of days that requests from external sites stay “Pending” at an INFO location depends on the system settings and/or ILL policy at that external site. For example, in co-operation with OCUL policy, the SOLS office has adjusted INFO’s VDX system such that the expiry period for INFO to OCUL requests is also 10 days.
2. ISO Messaging Overview

ISO to ISO systems send formatted messages using 2 forms of communication – TCP or email. Theoretically all ISO communication between VDX and other ISO compliant systems should work. However in practice this is not the case. For example, interoperability testing with Simon Fraser University (BVAS) and University of British Columbia (BVAU) have shown that the VDX ISO system doesn’t interoperate with RSS ISO which is the version of ISO that BVAS and BVAU run.

Note: Due to this inoperability issue, we are using GS to message with BVAS and BVAU.

Currently, successful interoperability testing has been completed with the following ISO protocol ILL partners:

- Library and Archives Canada (LAC)
- CISTI
- British Library (BL)
- Ontario Council of University Libraries (OCUL VDX users call their system RACER)
- Quebec university libraries (CREPUQ VDX users call their system COLUMBO)
- Canadian libraries using VDX Host

Testing is ongoing with libraries using RELAIS and Research Libraries Group’s (RLG) ILL Manager. Although there may be specific messaging issues for each location, they all share the ISO protocol in common. In particular it is important to remember:

- Do not action out of sequence (e.g. “Received” before “Shipped”)
- Wait for a “Cancel Reply Yes” or “Cancel Reply No” after actioning “Cancel”
2.1 Messaging with Library and Archives Canada

The LAC catalogue can be searched by selecting **AMICUS (Library and Archives Canada)** in the **Non-INFO [shared]** profile on the VDX BibSearch screen.


2.1.1 Restarting “Not Supplied / Check Manual” LAC Requests

If LAC is not able to fill a loan or copy request, they will automatically search for locations owning the item and add these locations to the rota. Requests that have a Locations Provided response - regardless of whether the Service Type is Locations, Loan, or Copy - automatically return to the requester as Not Supplied / Check Manual instead of moving on to the first added location. This allows INFO staff to edit the rota if necessary.

**Step-by-Step Instructions**

1. To find Not Supplied requests from LAC that have had alternate locations supplied, enter the following search query in the Request Search Interface:

   - Your Library’s Role = Requester (Borrower)
   - Status = Not Supplied
   - Authorisation Status = Check Manual
   - Log Message Type = AutoForward: Request not authorized

![Request Search Interface showing query to retrieve requests where LAC has added locations to the rota](image)

*VDX 2.7: Request Search Interface showing query to retrieve requests where LAC has added locations to the rota*
2. This search query will also bring up requests that have come back to you because the responder has answered Non-Supply with reason “not found as cited” or “responder specific”.

* You will have to look at the Audit screen of the request to check whether LAC has added locations.

On the Audit screen you will see the messages “AutoForward: Request not authorised” and “Provided/Trusted locations have been added to the rota”. The Answer Details section of the screen will list the locations provided by LAC.

If any location sent by LAC does not have a location record in VDX it will not be added to the rota. They will be referenced in Messages with “Provided/Trusted location symbol NLC:BNC XXX was not found”.

OPTIONAL: You can also check the added locations by going to the Responder screen. Locations added by LAC are listed before locations that were in the rota already.
3. If you will not be pursuing the request further, use the Complete button to clear it.

4. If you will be pursuing the request from external locations, select Action button. The only action available to you is REQUEST. Click **Submit**

5. Click **Rota** to edit the rota as desired.

   (a) IF Library and Archives Canada is listed in the Rota again (this happens if they also hold the item) but they’ve provided locations because their copy is unavailable, you will want to delete it.

   (b) You may wish to delete locations that charge.

   (c) You may wish to use the arrows to move locations up or down in the rota, giving priority to Ontario locations or other VDX users over out of province locations.

   ![Diagram of Rota screen](image)

   *In this example, QMUQ is a CREPUQ library that uses VDX*

   (d) If a responder’s message updates the request to a not supplied status, the request will automatically move on to the next location in the rota so you should take care that you only leave locations in the rota that you wish to use.

6. If you had requested a service type of “Locations” go to the **Service** screen and change this to Loan or Copy non-returnable.

   **Note:** At this time, there is a bug in the configuration which prevents the service type from being successfully changed to Loan or Copy when sending the request on to Generic Script (GS) sites. This means that you will not be able to action Received or Returned on these requests. Therefore, if you have requested “Locations” from LAC and then want to send the request to a GS location, it is advisable to create a new request record and manually add the desired locations to the rota.

7. After making your changes, be sure Authorization Status is “Authorized” and click **Submit** to send the request on to the next rota location. After a minute or so the request should move to a Pending status.
2.1.1 Requesting Canadian Archival Material on Microfilm from LAC

Follow step-by-step procedures in Requesting Canadian Archival Microfilm from Library and Archives Canada (OONL) found in VDX User Documentation section on the SOLS website at http://www.sols.org/resourcesharing/INFO/vdx/documentation/.

2.1.2 Requesting Newspapers on Microform from LAC

Follow step-by-step procedures in Requesting Newspapers on Microform from Library and Archives Canada (OONL) found in VDX User Documentation section on the SOLS website at http://www.sols.org/resourcesharing/INFO/vdx/documentation/.

2.2 Messaging with other Canadian VDX systems (i.e. OCUL, CREPUQ)


2.3 Messaging with Canadian VDX Host Sites

VDX Host is a modified form of VDX that some libraries subscribe to. Communications are ISO protocol. As with other external sites, simply add them to the rota manually if you would like to request from them. Currently, VDX Host libraries include:

- ONEMRCM - Natural Resources Canada, Energy, Minerals and Metals (EMMIC), BCC Library
- OOM - Natural Resources Canada, Energy, Minerals and Metals (EMMIC), Library
- OOMR - Natural Resources Canada, Energy, Minerals and Metals (EMMIC), Library
- OOG - Natural Resources Canada, Earth Sciences Sector, Earth Sciences Information Centre
- OOSP - Canadian Intellectual Property Office, CIPO Resource Centre
- SMJT - Saskatchewan Institute of Applied Science and Technology, Palliser Campus
- SPANI - Saskatchewan Institute of Applied Science and Technology, Woodland Campus
- SRRI - Saskatchewan Institute of Applied Science and Technology, Wascana Campus
- SSSI - Saskatchewan Institute of Applied Science and Technology, Kelsey Campus
3. **Generic Script Messaging Overview**

The ILL Generic Script (GS) developed by Library and Archives Canada is widely used throughout Canada. In order to enable INFO to communicate with as many sites as possible, the VDX vendor has developed GS drivers that: (1) translate GS messages into VDX messages and (2) translate VDX messages into GS messages. These drivers are called the GS translator and GS listener drivers and they run in the background in INFO on a continual basis.

External locations that do not use an ISO ILL system are entered in VDX as GS locations because their requests come into INFO in one of two ways, both of which use the GS format:

1. AVISO or another Canadian ILL system;
2. Amicus ILL link

All of these routes send GS messages into INFO VDX via the email address: infogsm@fdusa.com

Because this address only accepts GS formatted emails, text emails sent there bounce and are not accepted by VDX.

**EXAMPLE:** GS formatted email request that VDX GS Drivers will translate to populated VDX request form. LSB is borrower and LSP is provider.

```
ILL REQUEST/DEMANDE DE PEB
LSB: OOID
LSP: OOC
P/U: SMITH
ADR: International Development Research Centre - Library Interlibrary Loans
     250 Albert Street - (NCR: 152-OOID)
     P.O. Box 8500
     Ottawa, Ontario
     Canada  K1P 6M1
VIA: RCN
SMI: Printed
SER: LOAN/PRET
AUT: Cline, William R.
TIT: Trade policy and global poverty
P/L: Washington, DC.
P/M: Institute for International Economics: Center for Global EDD: 2004
DAT: 2004
SBN: 0881323659
CA#: HF1411 .C4355 2004
      5180
REM: Found in your library catalogue.
```
3.1 Messaging with locations using AVISO or another GS System

3.1.1 INFO library as Requester

Requesting from an external location requires exactly the same procedure as requesting from an INFO location, except that you must manually add the location to the rota.

Remember that requests sent to most East Coast and Prairie libraries (e.g. Alberta RELAIS Consortium, ECRC) must have an added note: INFO REQUEST. DO NOT ROUTE.

See the chart of Communication status of VDX with other systems on the website for details: http://www.sols.org/resourcesharing/INFO/vdx/using_vdx.htm

Requests sent to external locations that use GS systems don’t look particularly different from requests that have been created within the VDX environment. The most noticeable difference on the request search hit list is the form of the TGQ numbers, which begin with ‘B00’.

Workflow issues as a requester:

1. As a requester, remember that there is a Cancel action “shortcut” in place for GS responding locations. Instead of having to wait for a “Cancel Reply Yes” or “Cancel Reply No” (as you do with ISO and LASER sites) the request automatically moves on in the rota. An email is sent from VDX to the current responder informing them of the cancellation.

   Note: If you do not want the request to automatically move on in the rota, use ‘Local Change Request Detail’ and delete remaining rota locations before using the Cancel action.
2. Some sites using AVISO and other GS systems do not send a Shipped Indication so the VDX programmers have allowed an out-of-sequence workflow where it is possible to action Received before Shipped. Therefore you do not need to wait when you receive an item from a GS site, but can immediately action the request Received. At this point, copy requests will auto-complete. However loan requests will require manual completion after they have been actioned Returned, since GS systems do not send Checked-In Indications.

3. Other messages such as Not Supplied or Overdue parse directly into VDX and automatically update the request without needing intervention from ILL staff.

3.1.2 INFO library as Responder

Requests sent from external locations that use GS systems look similar to requests that have been created within the VDX environment. The only important functional difference is that you will not have the option to select an alternate service type on the Action: Shipped screen. Due to the nature of GS requests, they come in to VDX with only one service type associated with their record, as opposed to ISO protocol which allows the selection of alternate service types.

![VDX 2.7: Action: Shipped screen highlighting lack of alternate service type](image)
Workflow issues as a responder:

1. AVISO and other GS systems do not send Received or Returned Indications so it will be necessary to manually complete shipped copy requests. However it is possible to action Checked In without receiving a Returned Indication, so loan requests will still auto-complete.

2. Other messages such as Renewal and Cancel requests parse directly into VDX and automatically update the request without needing intervention from ILL staff.

3. As a responder, do not use the actions **Answer Conditional** or **Answer Hold** when replying to a request from a GS location. These actions cause the status of the request to go to Not Supplied. If you would like to indicate your willingness to provide an item, use action Will Supply. If you need to confirm with the requester whether they will accept a condition, use action Message.
3.2 Messaging with locations without an ILL Management System

3.2.1 INFO library as Requester

Requesting from a library without an ILL management system is the same as requesting from a library using AVISO, as described above (except there are no routing issues).

When requesting from locations without an ILL system, the workflow issues are similar to those described above for locations using a GS ILL system. However, more manual updating of requests is required, since all replies from the responder will go to an infoadmin email account instead of automatically updating the request in VDX.

**IMPORTANT:** Staff at OCLC PICA (the VDX vendor) will monitor all messages in the infoadmin email account that can’t automatically be received by the Generic Script listener. If the OCLC PICA staff can fix them so that the message can go into VDX, they do so.

However, there are times when the generic script request is responded to with text which can’t be read by the Generic Script listener. When this happens, the OCLC PICA staff will forward the message on to the INFO library who is the requester or responder.

- If the response indicates that the responding library will not be supplying the item, the requesting INFO library can action the request ‘Cancelled’ and it will move on to the next location in the rota.

- If the response indicates that the responding library has shipped the item, the requesting INFO library can use Local Request Change Detail and make a note in the request that it is being shipped or just wait for the item and action it Received when it arrives.

In VDX 3.0 and above, you will be able to action the request ‘Informed Shipped’, which will change the status to Shipped. ‘Informed not Supplied’ will also be available so that the request will just move on to the next location in the rota rather than having to cancel it (which sends a message to the responder).

3.2.2 INFO library as Responder

External libraries without an ILL management system can submit requests to INFO VDX libraries in one of two ways.

1. They can use the Request link within AMICUS for Ontario public libraries that make their holdings available this way. It is easy to identify requests that have come in to VDX via the AMICUS link based on the message in the Notes field, as shown below.

2. They can use the ILL mediation services of the SOLS Toronto office ILL Unit staff established for this purpose. SOLS staff will issue the request into VDX on behalf of the external library with “SOLS out of province request. If able to supply please send direct to XXX” statement in Notes. Information is available on the website at: [http://www.sols.org/resourcsharing/INFO/policies%20and%20procedures/ooi.htm](http://www.sols.org/resourcsharing/INFO/policies%20and%20procedures/ooi.htm)
A library must have a location record in VDX with a LAC symbol before their request comes in to VDX, otherwise their request will bounce. Before you refer a requesting library to use the AMICUS request link, do a location search to verify that the library is in the database. If the requesting location is not in INFO, then they (or ILL staff at the responding location, on their behalf) must contact INFO Operations HelpDesk (helpdesk@sols.org) to create a location record for that library in VDX. Most Canadian libraries will have a record in VDX because the location records from Library and Archives Canada Canadian Symbols Directory have been uploaded into the system; however it is always best to double-check.

Workflow issues are the same as those noted with GS systems above, except that more manual updating is required since all follow-up messages from the “no ILL management system” requester will not parse directly into VDX. They will be caught by the OCLC PICA monitored infoadmin email account instead and either massaged to parse into VDX or be forwarded to the responding library.
3.3 Locations that transmit requests via FAX submissions

3.3.1 INFO library as Responder

Whenever possible locations without ILL management systems should be encouraged to use Amicus ILL link or the SOLS ILL Unit mediation web form as described above in the Messaging with Locations Without ILL Management Systems section.

3.3.2 INFO library as Requester

To request from external sites that do not use email, it is possible to track the location in VDX using a workaround.

1. Select a bib record or select Requests / Create and type up the request details.

2. Select Rota button and type in the LAC code of the library you are requesting from. Select Add button so library name is entered in Rota box.

3. On Main screen. Select “Send” from list of Authorization Status options and Submit. (This type of request will never really be sent to an external location via VDX). The request will be assigned a VDX request number.

4. Use the Print button to generate a paper copy of the pertinent information in a format suitable for faxing.

5. Your request will remain Idle.
   
   Status: Idle Authorisation: Send Last Action: REQUEST

6. When you get the requested item, you can use the Complete button in VDX to clear it.

7. The lending library may include your request number with any paperwork they send with the item so you can do a request search. If not, you can search by title or by Role=Requester, Status= Idle, Authorization= Send to retrieve requests using this workaround. Browse the results for the title you are looking for.

   Note: Faxed requests will not be counted by VDX as a statistic in your Monthly Statistics report because the status never updates to Pending…Received…Returned etc. You will need to keep manual statistics for faxed requests.
### 4. Summary – ISO vs. GS

<table>
<thead>
<tr>
<th>Protocol</th>
<th>ISO</th>
<th>GS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who uses what?</td>
<td>INFO libraries (Laser)</td>
<td>Everybody else</td>
</tr>
<tr>
<td></td>
<td>Library &amp; Archives Canada</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CISTI</td>
<td></td>
</tr>
<tr>
<td></td>
<td>OCUL production sites</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CREPUQ production sites</td>
<td></td>
</tr>
<tr>
<td></td>
<td>VDX Host sites</td>
<td></td>
</tr>
<tr>
<td></td>
<td>British Library</td>
<td></td>
</tr>
<tr>
<td>Can I action out of sequence?</td>
<td>No</td>
<td>Yes (if necessary)</td>
</tr>
<tr>
<td>Can I use “Local Change Request Details”?</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Can I use “Answer Hold” and “Answer Conditional”?</td>
<td>Yes</td>
<td>Not recommended - these actions make the request Not Supplied</td>
</tr>
<tr>
<td>How does Cancel work?</td>
<td>Wait for a Cancel Reply Yes or No</td>
<td>When you action the request “Cancel” the request automatically expires at the current location</td>
</tr>
<tr>
<td>What can I manually complete (for work queue maintenance purposes)?</td>
<td>Requests with Auth Status = Check Error or Check Manual (if at end of life cycle)</td>
<td>Requesters: returned loans Responders: shipped articles; cancelled requests</td>
</tr>
</tbody>
</table>
5. Special Messaging Procedures

Chinook Arch Consortium Libraries (Alberta)

Libraries that are part of the Chinook Arch consortium are listed under the “member libraries” link on the Chinook Arch Regional Library Website at [http://www.chinookarch.ab.ca/chinookarch/index.cfm](http://www.chinookarch.ab.ca/chinookarch/index.cfm)

As noted in “Communication Status of VDX with Other Systems” chart on the website, requesters should direct ILL requests to the central office only. To do this, add ALCA to the rota.

Responders can reply directly to ILL requests received from any of the Chinook Arch libraries.

**Example Scenario:**

You are looking for
A study of the Sir Alexander Galt Museum and its proposed redevelopment / by McCorquodale, B. A.

- You do not find it in any INFO library.
- You do not find it in an AMICUS on the Web search of all Canadian holdings.
- You know the museum is located in Lethbridge Alberta. On a hunch you do a SUBJECT KEY WORD search in the Chinook Arch catalogue and verify it is held at Lethbridge Public Library.
- Chinook Arch catalogue: [http://books.chinookarch.ab.ca/ipac20/ipac.jsp?profile=capa#focus](http://books.chinookarch.ab.ca/ipac20/ipac.jsp?profile=capa#focus)

Select “Guest”

To request a loan you generate a VDX request to ALCA, the central office of Chinook Arch Consortium Libraries, whose ILL mediation staff will arrange a request to Lethbridge Public Library to determine if they will lend you the item.
Case 1: Request that expired due to the need by date
Rota Position - end of the rota

In this example the request was sent on 28 June 2005. GS locations have an expiry period of 30 working days (about 6 calendar weeks). The need by date entered by the end user in the request record was 26 Aug 2005, so on 26 August the request went to Automatic Expiry Occurred and the system sent a Cancel message to the GS responder.

The status line now reads:

At this point staff have the option of manually completing the request or extending the need by date and sending the request out again.

Service screen of the same request, showing that the Need by Date and the Expiry Date fields have the same date (26 Aug 2005).

This occurs whenever the date entered by the end user is earlier than the system calculated expiry date. In this case the need by date becomes the expiry date so the system simply puts the need by date in both fields.

Note: Although the Expiry Days field has a value of “5”, this is a default setting in the system for internal LASER requests which does not affect the actual expiry date calculation for GS requests.
Case 2: Request that expired due to the need by date
Rota position - middle of the rota

In this example the request was sent to Saskatoon Public Library on 3 February 2006. The need by date entered by the end user in the request record was 6 March 2006, so on 6 March the request went to Automatic Expiry Occurred and the system sent out a Cancel message to the GS responder.

The status line now reads:

At this point staff have the option of either manually completing the request or extending the need by date and sending the request out again.

The Responder tab of the same request shows that although the request is Not Supplied, there is still one responder waiting in the rota – Mount Saint Vincent University Library. Therefore if staff decide to extend the need by date and send the request out again, it will go to Mount Saint Vincent automatically once the request is authorized, unless the rota is edited first.
Case 3: Request that expired due to an expired end user record

In this example, the request was sent to OCL28 on 18 January 2006 but the end user’s record expired on 31 January. When this occurred the system sent an automatic Cancel message to the responder and generated an Automatic Expiry Occurred message. Therefore a client expiry will cause the request to expire even before the need by date (which for this request was 13 February).

<table>
<thead>
<tr>
<th>Location</th>
<th>Date</th>
<th>Action</th>
<th>From</th>
<th>To</th>
<th>Local Due Date</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>BLDSC</td>
<td>15 Nov 2005 16:03</td>
<td>REQUEST</td>
<td>Milo/Canée</td>
<td>Pending/Demandé</td>
<td>Status report: Pending/Demandé</td>
<td></td>
</tr>
<tr>
<td>BLDSC</td>
<td>19 Nov 2005 16:40</td>
<td>Answer Non-supply-Indication</td>
<td>Pending/Demandé</td>
<td>Not supplied/Doc not found</td>
<td>Answer not supplied; reason: lacks copyright compliance (No-18); Status report: Not supplied/Doc not found</td>
<td></td>
</tr>
<tr>
<td>OCL28</td>
<td>31 Jan 2006 03:15</td>
<td>Cancel</td>
<td>Pending/Demandé</td>
<td>Not supplied/Doc not found</td>
<td>Status report: Not supplied/Doc not found</td>
<td></td>
</tr>
<tr>
<td>OCL28</td>
<td>31 Jan 2006 03:15</td>
<td>REQUEST</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Messages

- 15 Nov 2005 11:11: End of rota reached
- 31 Jan 2006 03:01: Automatic Expiry Occurred
- 31 Jan 2006 03:01: Client has expired
- 31 Jan 2006 03:01: End of rota reached

Answer Details

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Action</th>
<th>Answer Date</th>
<th>Answer</th>
<th>Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 Nov 2005</td>
<td>BLDSC</td>
<td>Answer Non-supply-Indication</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The status line now reads:
**Status:** Not supplied i:31 Jan 2006

**Authorisation:** Check Manual

**Last Action:** REQUEST:31 Jan 2006

OCL28 is the last location in the rota but staff will not be able to add more locations to the rota and send the request out again until they remove the expiry date in the end user’s record. Alternatively, they can choose to manually complete the request and alert the end user that the item could not be obtained.
Case 4: Request that expired due to the 30-day expiry period
Rota position - end of the rota

In this example, the request was sent to Musée d’art contemporain on 23 January 2006 and then expired on 4 March because the 30 working day expiry period had been reached. When this occurred the system sent a Cancel message to the responder and generated an Automatic Expiry Occurred message in the Audit.

Since the request is at the end of the rota, the status line now reads:

As with the other examples where requests expired due to need by date or client expiry, staff now have the option of adding more locations to the rota or manually completing the request and alerting the end user that the item could not be obtained.

Service screen of the same request showing the 2 different dates visible to the requester.

Need by Date is the date entered by the end user whereas the Expiry Date is calculated based on the settings in VDX for the current responder location; in our case 30 working days from the date the request was sent to the GS responder.

Note: Although the Expiry Days field has a value of “5”, this is a default setting in the system for internal LASER requests which does not affect the actual expiry date calculation for GS requests.
Case 5: Request that expired due to the 30-day expiry period
Rota Position – middle of the rota

In this example, the request was sent to McGill on 5 January 2006 and then expired on 16 February because the 30 working day expiry period had been reached. When this occurred the system sent a Cancel message to McGill and the request briefly had a Not Supplied status before automatically moving on in the rota to the next location, where it is now Pending.

<table>
<thead>
<tr>
<th>Location</th>
<th>Date</th>
<th>Action</th>
<th>From</th>
<th>To</th>
<th>Local Due Date</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alberta U</td>
<td>06 Jan 2006 15:41</td>
<td>REQUEST</td>
<td>IdleCrée</td>
<td>PendingDemandé</td>
<td></td>
<td>Status report: PendingDemandé</td>
</tr>
<tr>
<td>McGill U</td>
<td>10 Jan 2006 10:04</td>
<td>Local Change Request Details</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>McGill U</td>
<td>16 Feb 2006 00:15</td>
<td>Cancel</td>
<td>PendingDemandé</td>
<td>Not supplied/Doc non fourni</td>
<td>Status report: Not supplied/Doc non fourni</td>
<td></td>
</tr>
<tr>
<td>OCL29</td>
<td>16 Feb 2006 00:17</td>
<td>REQUEST</td>
<td>Not supplied/Doc non fourni</td>
<td>PendingDemandé</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The status line now reads:

**Note:** It does not make a difference whether the request expires because of the Need by Date or the expiry period, or where the expired GS location is in the rota, you will always see a Cancel action in the main Audit trail and an “Automatic Expiry Occurred” in the Messages table.