Staff Guide

For VDX Libraries Implementing Patron Initiated Interlibrary Loan

Preparing Ontario public library staff to provide patron initiated interlibrary loan at their library
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Patron empowered interlibrary loan – why offer it?

It is the era of independence and do-it-yourself. Pump your own gas, automated banking machines and self check out at grocery stores and libraries. It makes sense to extend the convenience of self initiated interlibrary loan to those library patrons that would appreciate it. It’s not for every patron. There will always be a demand for library staff facilitated interloan just as there are still bank tellers serving customers in banks.

The VDX interlibrary loan management software used by Ontario public libraries has the ability to extend the initiation of an ILL request from the public service desks and back workrooms in libraries to a patron level. Using an end user interface called Zportal, patrons can submit their own ILL requests from home, school, the office… anywhere … any time.

Imagine your patron browsing your library’s online catalogue plus the catalogues of all the Ontario public libraries participating in INFO (Information Network for Ontario) at home in their pajamas while sipping their coffee. They can place an ILL request with a mouse click. They did not have to get dressed, drive to the library, explain to a librarian that what they want is not in the local library’s collection and fill in a request form that might take several days to be entered into the VDX interloan system depending on staff availability and work load.

Patron surveys indicate that they find the Interloan request interface easy to use and appreciate being able to check the status of their requests at any time. They also felt they were getting items faster. A patron initiated request is not delayed by up to 3.37 lag days of staff handling before entering the system. Depending on the time of day the patron submits a request (normal business hours vs. evening or weekend) it is feasible that a lending library could be preparing the item for shipping within hours.

What are the advantages for library staff?

The patron benefits are obvious. But what is the impact on library staff? With patron’s placing their own requests into the system will staff involvement in the interloan process dwindle? Or will the staff workload triple instead of trickle?

Patrons tend to issue more requests, at least initially, with the novelty of convenient access to resources beyond the local library. Higher statistics look good to boards, funders and delivery service benchmarks.

But can ILL department staff cope with an increased volume? Staff feedback in libraries currently offering the service suggests they do not experience a significant shift in their workload up or down. They may be receiving and returning more items but patrons do the front end work in an ILL request life cycle, outweighing any increased volume. Though many libraries do not elect to do so, it is possible to set a patron limit in the software to control volume.

Some libraries have a handful of patrons using “self-serve” Interloan and others offer it carte blanche. A few have branch staff submitting requests directly into the system on behalf of patrons using those branches instead of mailing, faxing or emailing those requests to the centralized ILL location for input.

“Offering this easy to use convenience to library patrons is a win-win for both patrons and staff.”
Promotion to library patrons

- ILLO department staff will know several patrons that place interlibrary loan requests regularly. You might want to start with them. Contact them to see if they would like to be “first up to bat”.

- Stimulate patron interest with signage near your library catalogue computers and with brochures at the public service desk and check out counter.

- A promotional brochure template is available in the ‘Patron Initiated ILL’ section on SOLS website. Promotional Brochure (tri-fold) - Word file - customize with your library details, photocopy for a hand-out

- Update the details that you provide to your patrons about Interlibrary Loan on your library website. For ideas, see website urls of some libraries that have implemented patron initiated interlibrary loan on the bottom of the ‘Check List for implementing Patron Initiated Interlibrary Loan’.

- SUGGESTION: Place a link to INFO on your library catalogue. Did not find it in our catalogue? Try Interlibrary Loan. The link could take the user to an information page on your website describing both staff mediated and patron initiated interlibrary loan options.

  The Interlibrary Loan information page could link users to INFO’s patron interface login screen, an online tutorial, and to a user guide on the SOLS website.

VDX Account Configuration Options

Trap Locally Held

When your library implements patron initiated ILL the INFO Helpdesk arranges with the VDX vendor to have a feature called “trap locally held” configured on your VDX account which circumvents patron issued ILL requests for items locally held in your own collection. If patrons request something that your library owns VDX will queue the request for staff intervention.

IMPORTANT: A day or so before you implement, you need to contact (helpdesk@sols.org) to have HelpDesk staff configure “trap locally held” on your VDX account.

User Limits

INFO HelpDesk can arrange with the VDX vendor to have “user limit within time frame” activated to protect against patrons having too many outstanding requests in a specific time span. User limits are assigned to Zportal users as a group and can’t be assigned to an individual. You will want to discuss the merits and pitfalls of this feature with INFO HelpDesk VDX support staff before deciding to implement it.
Staff can experiment using INFO Test Systems

Library staff can use INFO Test systems along with the Staff and User guides documentation to experiment with patron initiated interlibrary loan.

- **Test VDX** - test systems contain ‘8443’ as part of the url
  Log in to Test VDX with your usual VDX barcode and password
  https://info.vdxhost.com:8443/vdx/

- **Test Zportal** – test systems contain ‘8443’ as part of the url
  Sign in to Test Zportal with a user ID and password that you created in Test VDX
  https://info.vdxhost.com:8443/

Patron’s can search INFO without logging in. If they try to place a request they are prompted to log-in.

The Home screen advises patrons to register with their library to use the patron self-serve interface to place their own requests.
Staff register patrons for self-serve ILL by creating user record

Patrons apply for registration for self-serve ILL. Libraries usually provide a webform for patrons to submit their request for registration to ILL Department staff.

To be “registered” patrons need a VDX User Record with specific user category assignment.

1. Staff select “User” in VDX sidebar menu to create a user record for the patron or modify a pre-existing record.

2. Set patron’s password for initial log-in. Put a tick in “Update Password” box and enter a simple password that you will provide to the patron. e.g. last 4 digits of the patron’s phone number.

   **Note:** Patron’s can change their own password after they have logged in to the system.

3. Add the user’s email address to their user record to facilitate either:
   a. Send User Alert action on requests (very handy)
   b. VDX’s emailed notification to pick up received item.
      See “Patron Notification by Email for Received items (*optional VDX configuration)” in this staff guide for more details.

4. Select user category assignment. See two patron user category options described below.
   The category can be changed at any time. For instance, an “Auto Authorized Patron” can be changed to “Manual Authorized Patron” in future if you find that you want to monitor that individual’s requests before they go in to the system.

   ![Assign password to this user record, making sure “Update Password” is selected.](image)

   ![Assign user category](image)

   ![Use Note fields to record when patron registered for self serve ILL and what start up password you assigned](image)
Two options for the patron’s user record category assignment

1. Patron Category setting = **Auto Authorized Patron**
   
   Select if you are having the patron’s requests automatically go into VDX without staff intervention. This category assignment accommodates the patron getting the item faster and saves staff time as there is no need to further process requests before they go into the system.

2. Patron Category setting = **Manually Authorized Patron**
   
   Select if you require patron initiated requests to be reviewed by library staff before the request goes into VDX. This category may be practical for “problem” users. The requests for this category of patron will remain “Idle/Automated:AuthManual” in the Work Queue until staff further processes them.

Testing the login credentials in Zportal before providing them to patron

After staff have setup the patron’s VDX user record it is highly recommended that you test the login in Zportal before giving it to the patron. There may be a typo in the password or CAPLOCKS was on unknowingly. It is also an opportunity to set up some Zportal defaults for the patron.

1. Sign in as the patron with the username and password you created.
   Remember, you do not use your library barcode preface and hyphen when logging in to Zportal. You only enter what follows the hyphen in the barcode field of the VDX user record.

2. On the Zportal Standard Search screen select the search profile that would be considered the patron’s “Home” profile. The one that best represents your geographic area and has your catalogue listed (if your catalogue is stand-alone and not part of a joint catalogue). When you sign-out of Zportal, the last search profile used remains set for the next login so when the patron first signs In their home search profile is selected.

3. Visit “My Requests” and place a tick mark in “Show everything”. The patron may not think to do this. When selected, completed requests will display as well as currently active requests.

4. After testing the login credentials, contact the patron (usually by email) to provide:
   a. the patron with their sign in User ID and password.
   b. the patron with links to user documentation.

   *There is a **Patron Guide for placing your own interlibrary loan requests** on the SOLS website. Most libraries provide the link to it to their patrons when they register. Some libraries have created their own 2-3 page summary versions of the full user guide for their websites.*

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Southern Ontario Library Service (rev March 2018)
Training an end user

Training the end user “virtually” (this is the norm)

For the majority of patrons, providing them with their username and password and the link to the
“Patron Guide for placing your own interlibrary loan requests” on the SOLS website will suffice.

Libraries may also use the “Patrons experience issuing their own ILL requests” video on the SOLS
website as a video tutorial for patrons on the library’s website. Or a library may want to make their own
custom video similar to the examples on the “Check List for implementing Patron Initiated Interlibrary
Loan at your library”.

Training the end user “in person”

Some users will benefit from a face-to-face orientation to the interface by library staff. Give the user the
“Patron Guide for placing your own Interlibrary Loan Requests” (a take home guide for patrons initiating
their own ILL requests on the SOLS website).

1. Point out the URL in the guide for connecting to the ZPortal end user interface (or where they can
find a link on your library website or online catalogue).

2. Go through the Guide with some hands on with the patron so you have covered the basics.

3. Make sure the user has noted the ILL Department email and telephone contact information in
their user guide so they can contact you for renewals.
**New Daily Work Flow Adjustments for library staff**

**Monitoring Idle - Auth Manual in your Work Queue**

Typically, non print format requests will queue in this category, such as DVD that require you to check them and authorize them into the system.

Also, if you have any patrons assigned with the “Manual Authorized Patron” category in their user record then their requests remain Idle with authorization status of “Automated:Authmanual” in your Work Queue until staff authorize them into the system.

- **Automated** - means that the rota was built by VDX and it is ready to go
- **Authmanual** - means the request needs to be manually authorized into the system by staff

**Staff processing of “Idle – Auth Manual” requests**

1. Select the request from "Idle – Auth Manual" category in the Borrower Work Queue.
2. Select “Request” action. Scroll to patron details to check if Client Status is MANP.

![Client status Manp](image)

*Client status abbreviation is MANP for “Manual Authorized Patron” user category*

3. If you are approving/authorizing request, confirm that Authorization Status is set as “Authorized” and use “Request” button to submit the request.

4. If you are not approving the request at this time because there are too many for the same patron and you want to stagger them in to the system a few at a time, make a note for yourself in Private Note that this was your decision and note a date that you will authorize further requests.

5. If you are not approving/authorizing the request at all (i.e. too new for ILL) then follow the steps in “Staff processing of Idle – Locally Held requests” so the patron is advised.
Monitoring Idle - Locally Held in your Work Queue

When a library implements patron initiated interlibrary loan the INFO HelpDesk arranges for “Trap Locally Held” configuration for that library. This feature prevents ILL requests from automatically going into VDX if the local library location is an ISBN match and has been put in the rota. This is the case for both Auto Authorized Patron and Manual Authorized Patron categories, in fact any patron category on any request if your location has been configured and owns the same ISBN.

Staff processing of “Idle – Locally Held” requests

1. Step One - Select the request from “Idle – Locally Held” category in Borrower Work Queue. The status will be Idle / Check Manual and requires staff intervention.

2. Select Details link. Note that your own location is number 1. in the rota queue and “Local location on Rota” confirmation in “Log Messages”.

3. Make a decision – will you deny or proceed with request?
   a. You will process the request into VDX if your locally held copy is not viable because it is lost, damaged, missing etc. or you need additional copies for a book club.
   b. You will deny the ILL request if your locally held copy is viable and can be pursued for the patron.
4. If processing the request into VDX because your local copy is NOT viable:
   a. Select "Request" in list of available request actions.
   b. Scroll to ROTA details section of request form.
   c. Select your own location at the top of rota listing and use “Remove” to remove your location from the rota.
   d. Scroll to top of request form and select “Authorized” in Authorization status.
   e. Submit the request.

5. If denying the request because your local copy will be used for the loan:
   a. Select “Request” in list of available request actions.
   b. **IMPORTANT: Select “Un-Authorised” for the status.**
      You do not want the Idle request actually being an authorized request on your own picklist.
   c. Position cursor at the beginning of Title field, type “*UNFILLED – LOCALLY HELD*” to precede the title. This alerts the patron to use the Details link on the request to read the request Notes section if they are browsing Zportal “My Requests” section.
   d. Scroll down to Patron Note area to type an informational statement for the patron.
      **IMPORTANT:** You MUST select Patron Note or the note will not be visible to the patron in the Zportal interface.
   e. Use “Request” button to save the edits that you made to the title field and Patron Notes.

6. Retrieve the request again from Idle-Locally Held category in the work queue or search by request #. There is an additional step you can take to notify the patron.

**TIP:** To cut down on typing save frequently used statements in a Word file that you can have in your task bar to cut and paste into Notes.
7. Now continue with Step 2, selecting “Send User Alert” action.

This staff communication to the patron may be useful to repeat with the “Send User Alert” action, which allows staff to send an “ad hoc” email from a VDX request to a patron regarding that request.

If you plan to also email the patron, check that an email address is present in the Patron Email address field. If there is an email address in the patron’s VDX user record, it will automatically populate the Patron Email address field by default.

a. If there is an email address, proceed with the “Send User Alert” action.

b. Observe the note you typed into Patron Note area in Step 1 is already there.

c. Select “Send” button to send user alert email. The patron will get an email with the information entered into “Patron Note” as well as the ability to view it in Zportal “My Requests” display.

Example of email patron would receive when staff use the VDX “Send User Alert” action.
TIP: If the Patron Email address field is blank, it can be added if you have access to it.

- To add, use “Request” action and scroll down to “Patron Details” section
- Type email address into “Client Email”.
- Select “Request” to save the edit to the request.
- Then proceed with “Send User Alert” action.

![Example of entering patron's email address on the Request Details screen, if it is not already there.]

Why bother typing a “See Note” alert at beginning of the Title field?

It is helpful to the patron if you type an alert at the beginning of the “Title” field to instruct them to examine the request details to read the explanation you typed in Patron Notes.

![Example of patron's view when staff inserts a “SEE NOTES” alert at beginning of Title field]

The patron can see the request in more detail by selecting the “Title” hot link or Details link. They can scroll down to the Notes section to see information provided by library staff.

![Example of patron's view of request Notes area, with information from library staff]
VDX Received list needs to be consulted when items actioned as received

If you have not relied on the VDX Received List to facilitate patron notification to pick up items, you will need to use it once your library has implemented Patron Initiated Interlibrary Loan.

If your habit was to keep a paper trail, you will not have paper for the requests patrons have entered themselves. The “Entered by” field on the VDX Received list provides clues for staff as to who entered the request and will explain why there is not a piece of paper for some requests.

Entered by: indicates if entered by the patron initiating the request OR if entered by staff mediating on behalf of the patron

Patron: Jill Pangborne 436-5555  
Phone:  
Email: jill@sols.org  
Request No.: 1240790  
Title: You’re not my cat / written and illustrated by Theresa Burns.  
Supplier: Test 1  
Barcode: OSTRO-123  
Pickup Point: Innisfil - Cookstown  
Entered By: Jill Pangborne  
Cost: 0  
Due to Supplier: 28-DEC-2003

Patron: Jack Spratt 458-7777  
Phone:  
Email:  
Request No.: 1240890  
Title: You’re favorite Dog Breeds  
Supplier: Test 1  
Barcode: OCOO-456  
Pickup Point: Innisfil - Cookstown  
Entered By: STAFF Innisfil - Cookstown  
Cost: 0  
Due to Supplier: 28-DEC-2003
Options for staff to use Zportal to place requests on behalf of patrons

Library Staff (public service desk staff at main library or branch staff) can use a Zportal account to submit interlibrary loan requests on behalf of patrons they are serving.

This is more immediate and reduces overall staff handling. Paper request forms do not need to be filled out and delivered to the centralized ILL Dept. for entering into VDX. Faxes from branches, web forms or emails are not necessary for remote staff to submit an ILL request on behalf of a patron.

There are two options, depending on your patron notification procedures and “paper” or “paperless” practices.

Option 1: Requests queue in VDX as Idle to allow centralized ILL Dept. staff intervention to “tweek” the patron details before the request enters the system. Maintaining paper files is not necessary.

Option 2: Requests automatically go into the system. Maintaining parallel paper files would be supportive.

Option 1: ILL Dept staff intervention before request enters the system

Requests created by public service staff do not automatically enter the system. They will queue under “Idle/Automated:Authmanual” Category in the VDX work queue. This allows ILL Dept. staff to access the request to override the staff account as the requester with the true patron details before it is authorized into the system.

- This eliminates the need to maintain a paper request file for patron notification of received items.
- Request will be searchable in VDX by patron barcode or surname.
- Patron details will be printed on the Received List to facilitate patron notification to pick up item.

Creating the VDX User Record for Option 1

Create a VDX user record for public service desk staff to use or create one that represents staff at a branch. Select appropriate User Category for your purpose. Assigning proper category is necessary for statistical reporting that reflects true patron initiated requests vs. ones mediated by staff on behalf of patrons, especially in libraries that have implemented patron initiated interlibrary loan for their users.

1. Remember, when creating a new user record, that you need to preface it with your VDX barcode followed by a hyphen, no space.

2. Make the user barcode easy to remember and quick to enter. It does not have to be numbers.

   Example:      PSD for Public Service Desk
                  REF for Reference Dept
                  KING for King City Branch

3. Make the password easy for staff as well. e.g. “ILLO”.

4. Leave First Name field blank. Use the Surname field to identify the user. e.g. “Public Service Staff Main” or “King City Branch”

   1 See glossary of VDX user category definitions in this document.
5. Select “ILL Librarian (Manual)” user category if you want to be able to update the Client details in the request to those of the true end user before the request is authorized into system.

6. Make use of numbered Note fields at the bottom of the user record to record the purpose of this user record. These Note fields are visible only by staff.

![](image)

*In this example the user record is for public service desk staff in the main library*
Public service staff add patron’s details in request Notes

Library staff using the public service desk or branch user account in Zportal MUST add the patron’s name, phone number, library card # (whatever is helpful in identifying the requesting patron) in the “Special Instructions” area of the Zportal request form.

N.B. Anything that is typed into “Special Instructions” area does not get transmitted to lending libraries so the patron’s privacy is protected.

![Request Form](image)

Patron’s name and/or library card number and phone number in Special Instructions
Centralized ILL Dept Staff manipulation of the request

“ILL Librarian (Manual)” user category requests will queue under Idle/Automated:Authmanual in the VDX Work Queue for further processing by VDX staff.

1. Select REQUEST action on the request.

2. Look for Client Note area where remote staff recorded patron’s name, library card number, phone number etc.

   ![Client Note Example]

   * For libraries that have created VDX user records, follow step 3.
   * For libraries that have NOT created VDX user records, go to step 4.

3. Copy and Paste the barcode from Client Note or type patron’s barcode into “Client Barcode” and select Validate link.

   ![Patron Details Example]

   Client Name “Public Service Desk” will be overwritten with the actual patron details if there is a user record for that patron. If user record does not exist, you will get “Error in Client Barcode” message and you can create a user record.

4. Request will be searchable by patron’s barcode or surname and client details will be on the VDX generated Received List.
4. Libraries that have NOT elected to create VDX user records can still enter the patron name on the request if their VDX staff login has been configured as “Staff No Validate”. This configuration option is very useful for those libraries that don’t create user records in VDX.

NOTE: Consult VDX 9.1 User Manual, pg.104 “Free-text entry of patron details on requests” section for easy instructions to configure this for your VDX login.

A library with their VDX staff login configured with “Staff No Validate” category will see different prompts in the Patron Details section of the VDX ILL request screen instead of the VDX default Client Barcode and Validate link.

(a) To replace “Public Service Desk” as the Client Name on the request, look for Client note area where remote staff typed the patron’s name, library card number, phone number etc.

(b) Highlight to select the patron details and select “Copy” (or CTRL-C).

(c) Scroll down to Patron Details section. In this example, “Public Service Desk” populates the “Client Name” field.

(d) Highlight “Public Service Desk” and use “Paste” (or CTRL-V) to copy the client name details from above into the Client Name field.

(e) As the final step, with the Authorization Status as “Authorized” submit request into system by selecting Request button. The request will update to a Pending status with the first rota location.
(f) When requested item arrives, process it with VDX Received action. The VDX generated Received List will have the patron’s details on it to facilitate patron notification to pick up item.

<table>
<thead>
<tr>
<th>Patron Name: Allison Williams</th>
<th>Barcode: OSTMY-LIBSTAFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone:</td>
<td>Pickup Point: St. Marys - Main</td>
</tr>
<tr>
<td>Email:</td>
<td>Entered By:</td>
</tr>
<tr>
<td>Responder9907053</td>
<td>Cost:</td>
</tr>
<tr>
<td>Req. No.:</td>
<td>Due to Supplier:</td>
</tr>
<tr>
<td>Title: Coco, the novel</td>
<td></td>
</tr>
<tr>
<td>Supplier: Essex County - Main</td>
<td></td>
</tr>
</tbody>
</table>

NOTE. Paperless is possible. If using Option 1 and making use of the VDX Received list as a workflow tool it would not be essential to have a paper copy of the request to consult and you would not need to ask public service staff to print out the requests they issue on behalf of patrons and deliver them to the ILL Dept. for filing.

Option 2: Requests automatically go into the system

Requests created by public service staff enter the system immediately. This option saves staff time and handling. It gets the request moving right away and materials will arrive faster.

Creating the VDX User Record for Option 2

1. Create a VDX user record for public service desk staff to use or create one that represents staff at a branch. See steps in Option 1.

2. Select “ILL Librarian (Auto)” user category. Requests issued by a user with this category will automatically be authorized into the system and will become pending with the first rota position. They will not be available for further staff intervention before entering into the system.

Receiving Items issued by this category

When items are being processed with the VDX “Received” action, the requests will appear to be for “Public Service Desk” or “King City Branch” (for example) but the true patron’s details should have been entered in “Special Instructions” area.

Option 2, where requests automatically go into the system without staff intervention, will benefit from a parallel paper system to consult for patron details.

However, if the paper printout is overlooked or misplaced, all is not lost. Staff can view the patron information typed into the Notes area on the request online.
The Paper Printout

- If your library relies on paper files for patron notification because you do not use VDX user records (or otherwise record a patron name in VDX requests) then it will suit your purposes to have public service desk staff/branch staff take a “PRINT RECEIPT” after issuing a request in Zportal on behalf of a patron they are serving. (See Example of Zportal “Print Receipt” printout).

- These printouts can be delivered to the ILL Dept. for filing (alphabetically by title, or otherwise).
  
  o Where the printout was created by staff in the main library, it is convenient to deliver the printout to the ILL Dept staff, who are in the same location.
  
  o In branches, it may be more convenient for the branch staff to maintain a file of paper printouts of the requests issued from their location and have branch staff perform the patron notification step, after central has forwarded the received item to the branch.

  Again if the paper printout was overlooked or misplaced, staff can log in to their Zportal account and find the request listed under “My Requests” to check the notes area for the patron information.

- When the requested item arrives, staff can pull the paper printout to facilitate contacting the patron to come to the library to pick up their item.

- Once patron has picked up their ILL item, the printout can be discarded.

**Request Details**

<table>
<thead>
<tr>
<th>-- LOAN Request -- 01 May 2011 --</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Number: 9906281</td>
</tr>
<tr>
<td>Author(s)/Editor(s): Katzen, Mollie 1950-</td>
</tr>
<tr>
<td>Title of Book: The vegetable dishes I can't live without</td>
</tr>
</tbody>
</table>

**Pickup Location**

<table>
<thead>
<tr>
<th>Address: SOLS VAN ROUTE: G</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street: 15145 Yonge Street</td>
</tr>
<tr>
<td>City: Aurora</td>
</tr>
<tr>
<td>Region: Ontario</td>
</tr>
<tr>
<td>Post Code: L4G 1M1</td>
</tr>
<tr>
<td>Phone: 905 727-9493</td>
</tr>
<tr>
<td>E-mail: <a href="mailto:illo@library.aurora.on.ca">illo@library.aurora.on.ca</a></td>
</tr>
</tbody>
</table>

**Further Information**

<table>
<thead>
<tr>
<th>This item is not needed after: 16 Nov 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special Instructions: Ellen Smith 987-9999 0005689942</td>
</tr>
</tbody>
</table>
## Glossary of VDX User Category Selections

<table>
<thead>
<tr>
<th>User Category</th>
<th>Definition and application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved Patron</td>
<td>Approved for Interloan service. Staff always issue on behalf of the patron.                                                                                                                                ------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Auto Authorized Patron</td>
<td><strong>FOR LIBRARIES THAT HAVE IMPLEMENTED PATRON INITIATED ILL</strong> Patron issues their own requests which automatically enter the system. Recommended category assignment for self-serve patrons and best overall savings in staff time and costs.</td>
</tr>
<tr>
<td>Manual Authorized Patron</td>
<td><strong>FOR LIBRARIES THAT HAVE IMPLEMENTED PATRON INITIATED ILL</strong> Patron issues their own requests but they do not automatically enter the system. Requests are queued under Idle/Automated/Authenticated for staff authorization into the system. Used for patrons that you want to keep an eye on – perhaps they request too much at a time or frequently do not pick up their ILL items.</td>
</tr>
<tr>
<td>ILL Librarian (Auto)</td>
<td>Library staff (public service desk at central location or staff in branches) using Zportal to issue on behalf of a patron they are serving. Request enters the system right away. The patron’s name, barcode, telephone number should be entered into Special Instructions section of the Zportal request form so the true patron details are recorded in request notes because the request will be identified with “Public Service Desk” or “Northeast Branch” as the requester, for example. Public Service Desk or branch may want to print the Zportal “request receipt” printout so that paper work can be filed for patron notification. The request notes area can always be referred to in order to determine patron details.</td>
</tr>
<tr>
<td>ILL Librarian (Manual)</td>
<td>Library staff (public service desk at central location or staff in branches) using Zportal to issue on behalf of a patron they are serving. The patron’s name, barcode, telephone number should be entered into Special Instructions section of the Zportal request form so the true patron details are recorded in request notes. The request will queue under Idle/Automated/Authenticated for ILL Dept staff intervention. This allows ILL Dept staff to update the request and overwrite the public service desk or branch name with the true patron details before it enters the system.</td>
</tr>
<tr>
<td>Unidentified User</td>
<td>Not used – limited practical application for INFO</td>
</tr>
<tr>
<td>Virtual Online Patron</td>
<td><strong>DO NOT SELECT!</strong> Do not use. This category is for the virtual online community library users in northern Ontario only.</td>
</tr>
<tr>
<td>Staff No Validate</td>
<td>If a library does not create user records in VDX and validate against them so that patron details are on the request, then they might want to have their own Staff login configured with a Staff No Validate category. This will cause VDX to replace default Patron Details section on request forms with prompts that can be filled in on each request so that user details are recorded on the request and the Received report and the library does not have to rely on paperwork to know who the request is for. This also allows the request to be searchable by patron name in VDX which is useful.</td>
</tr>
<tr>
<td>Staff</td>
<td>This category is strictly used for the ILL Dept VDX log-in. It should not even be used for other staff in the library that have a VDX account. If they are not the principle staff using the VDX staff login to manage requests then “Approved Patron” is suitable for other staff member’s user records (or Auto Authorized Patron or Manual Authorized Patron in libraries that have implemented patron initiated Interloan and the staff person issues their own personal requests.</td>
</tr>
</tbody>
</table>