
Chapter 11: Communications from the request

Send Public Note – messages between libraries

At any time in a request life cycle the borrowing library staff or the lending library staff may want to send a message to communicate about a request. Sending a “Public Note” can be done along with another action taken on a request or it can be an independent action.

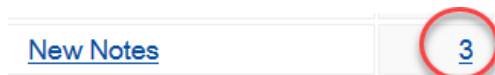
1. Select **Send Public Note** from the list of Available actions.
2. Type your message in the “Public Note” box.
3. Select “Send” button to submit note.

Action: Send Public Note	
Our Number	15184456
Status	Overdue
Title	Reeva
Subtitle	a mother's story
Author	Steenkamp, June;Edworthy, Sarah
Public Note	May 22, 2017 - We will be returning this overdue item shortly. The patron is out of town, returning next week. We will get it back to you as soon as possible. JP/ILL Dept.
Private Note	May 19 - Emailed patron re overdue. JP

Public Note sent to inform lending library staff of current situation.

Staff recorded actions taken in Private Note (only visible to staff).

When a request has a note sent on it with “Send Public Note” action it will queue under “New Notes” in the respective library’s work queue so they are alerted to select and view.



Send User Alert – emails directly to the patron

The Send User Alert action allows you to send information to your patron with an “ad hoc” email message to the email address in the request.

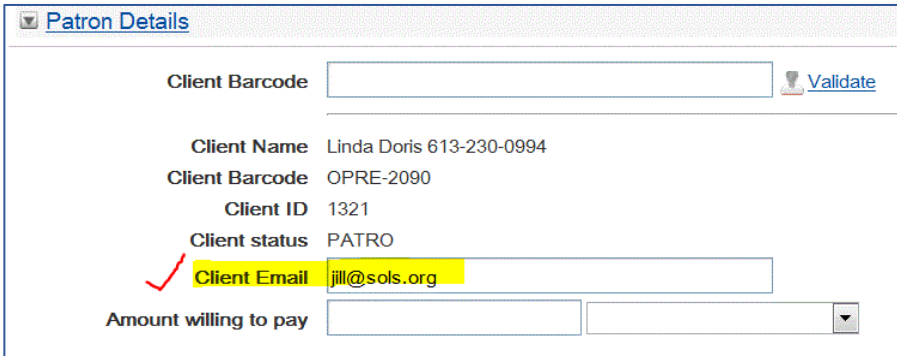
This can be very handy for communications, such as:

- Request for renewal was denied and item recalled, patron needs to return item ASAP
- Item is too new for interlibrary loan, try again in 3-6 months
- Only Ontario location is a charging university, do they want to pay fee
- Received item is large print when they requested regular print, do they still want it
- Request item cannot be obtained, only location is Toronto Reference-non circulating
- Lending library has sent an invoice for payment of damaged book

Procedure:

1. Use [Details](#) link on the chosen request to determine if a patron email address is displayed with the patron details. If there is an email address entered in the patron’s user record, or if staff entered an email address when the request was first created, then it will be visible in “Patron Details” section.
2. If there is no email address populating the Client Email field, you have two choices:
 - a) Edit user record to add email address so it will always be available in the future.
 - b) Select “Local Change Request Details” if it is on the action list.
Note: this is not an available action for all request states.

You will get a Client Email field on this screen where you can enter the patron’s email address on this request.



The screenshot shows a web interface titled "Patron Details". It contains several fields for client information: Client Barcode (with a Validate button), Client Name (Linda Doris 613-230-0994), Client Barcode (OPRE-2090), Client ID (1321), and Client status (PATRO). The Client Email field is highlighted in yellow and contains the text "jill@sols.org", with a red checkmark to its left. At the bottom, there is an "Amount willing to pay" field with a dropdown menu.

Example of entering patron’s email address on the Local Change Request Details screen.

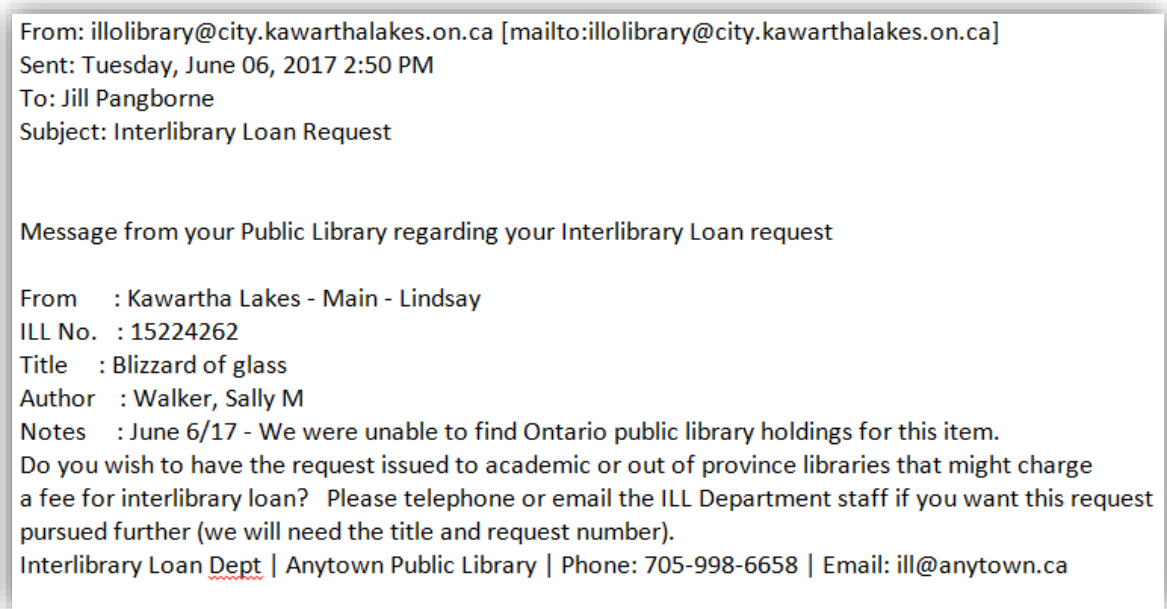
- c) Select “Save” button to save the change made to request details and then use [Results](#) on ‘Action Successful’ screen to go back to the request again.

3. Select **Send User Alert** from list of available actions.

Enter your communication to the patron in the **Patron Note** box.

Private Note	<input type="text"/>
Patron Note	March 3, 2011 - The lending library sent a Large Print edition by mistake. Would you like this item returned and a new request placed for regular print (which could take a few more
<input type="button" value="Send"/> Reset	

Example communication with patron asking if they will accept Large Print when regular print was requested.



Example of an email the patron would receive when you use the “Send User Alert” action.



Tip: It saves a lot of typing to have a list of commonly used statements in a Word file open in your task bar to copy and paste into the “Patron Note” field in VDX.

*See **Appendix 4: Copy Paste statements for Send User Alert action** for some suggestions.