
Chapter 15: User Records in VDX (or not)

Creating VDX user records

Creating patron user records in VDX enables the system to automatically incorporate patron information into ILL requests.

Select **User** in left menu panel. Use the [Create](#) link at the top of the 'User Search' screen to retrieve a blank user record screen to be completed.

Entering User Details

1. **Barcode** - enter your library's location code in caps (e.g. OGAL) followed by a hyphen (no spaces) and a unique number for the patron (can be up to 20 characters long). Usually this is the patron's library card number.

e.g. Innisfil patron library card number **0429** could be entered as **OSTRO-0429**

Note: Why enter the library location code plus hyphen preface? This authenticates the barcode as belonging to a patron of your library system. Potentially libraries could have the same barcode numbers.

2. **Password** – a password is required in user record of patron's that will be issuing their own interlibrary loan requests using Zportal interface to VDX. If you are creating a user record for a patron that library staff will be managing requests for then a password is not required.

Note: Passwords are assigned to patrons because system is designed to allow direct requesting by patrons using the Zportal interface to VDX.

3. **First Name** – enter full first name. i.e. Sally or Richard. Avoid using initials.

4. **Surname** – enter surname. (Enter patron's phone number in brackets after surname)



TIP: Entering patron's contact phone after surname is a quick way to see this information for future patron notification. It does not "pollute" the surname field for User Record search by surname because you can search on 'any part'.

5. **Email** - Including an e-mail address allows patron to take advantage of automatic e-mail notification for received items if you have opted to have INFO activate this feature for your library. The email address is also highly useful for VDX's "Send User Alert" action.

Note: Patron's phone number and email display on the Standard Received Report after you process the Received action.

6. **Category** - select **Approved Patron** if library staff will be mediating requests on behalf of this user.

Note: *See **Glossary of VDX User Categories** for usage notes on all categories.

7. **Join Date** - enter current date.

8. **Expiration date** - enter **only if** you want patron's record to be unusable.

Note: Setting an expiry date gives an error message when trying to create a request for an expired patron. *See "Expire and Unexpire a VDX user record" to reverse this.

9. Select '**No**' in Banned box.

Note: A user who is Banned=Yes in their VDX user record will not be able to log-in to the VDX Web Client or Zportal interface to VDX. The "Banned: Yes/No" setting can be toggled on or off by staff in the User record.

10. **Has Presigned Copyright** – select '**Yes**' for requesting photocopies for the patron.

11. **Default Pickup Location** – if you have branches you can select a pickup location default for this patron in their user record that will automatically be set on their requests. The default can be overwritten on a request.

12. Once the form is complete, select **Submit** button at the bottom of the screen to create a new user record in the VDX database.

Barcode

Password Update Password

Confirm Password

Alternative Barcode

First Name

Surname

E-Mail

Category

Join Date (e.g. 1 Sep 2003)

Expiry Date

Location

Banned In VDX

Has Presigned Copyright

Default Pickup Location

Note/Stat 1

Note/Stat 2

Note/Stat 3



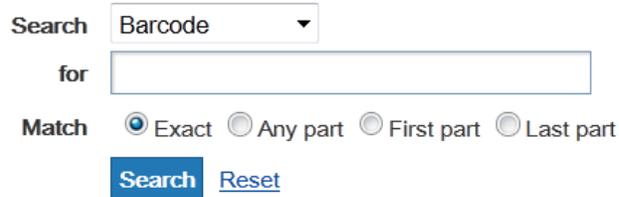
Note: Entering address information to a patron's User Record is not advised. A patron's address details are recorded in the library's circulation system and are not necessary in the VDX user record.

Glossary of VDX User Categories

USER CATEGORIES	DEFINITION AND APPLICATION
Approved Patron	Approved for Interlibrary loan service. Staff issue on behalf of the patron. Most commonly used category.
Manual Authorized Patron	<p>*For libraries that have implemented PATRON INITIATED ILL</p> <p>Patron issues their own requests but they do not automatically enter the system. Requests are queued under Idle/Automated:Authmanual for staff authorization. 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.</p>
ILL Librarian (Auto)	Library staff (public service desk at central location or staff in branches) using Zportal account 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.
Auto Authorized Patron	<p>*For libraries that have implemented PATRON INITIATED ILL</p> <p>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.</p>
ILL Librarian (Manual)	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:Authmanual 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.
Unidentified User	Not commonly used
Virtual Online Patron- DO NOT SELECT!	Do not use. This category is for the virtual online community library users in northern Ontario only.
Staff No Validate	<p>*If a library does not create VDX user records</p> <p>and Validate against them so that patron details are transferred to the request, then the library 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 library does not have to rely on paperwork to know who the request is for. This also allows requests to be searchable by patron name in VDX which is very useful.</p>
Staff	<p>*Strictly used for the ILL Dept. staff VDX log-in.</p> <p>Should not even be used for other staff in the library that have a VDX user record. 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 Interlibrary loan and the staff person issues their own personal requests.)</p>

Searching User Records

1. Select '**User**' link from left sidebar menu to display User Search screen.



Search

for

Match Exact Any part First part Last part

[Reset](#)

2. Select your search criteria from **Search** drop-down menu.
3. Enter your search terms into the free-text search box.
4. Select the appropriate radio button from the **Match** menu:
 - **Exact** retrieves records matching your search terms exactly, but is not case sensitive.
 - **Any part** retrieves matches including your search term in any part of the string.
 - **First part** retrieves matches including your search term at the beginning of the string.
 - **Last part** retrieves matches including your search term at the end of the string.

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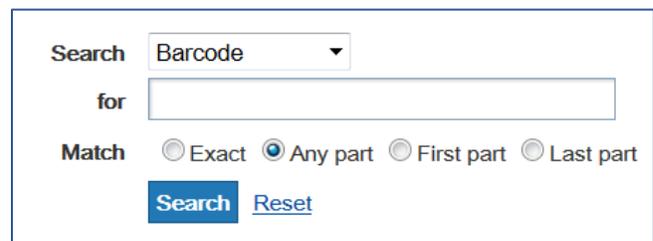
 [Details](#)  [Edit](#)  [Expire](#) [Unexpire](#)

Example of User Search result for Surname=Pingpong with Match=Exact

Example: List user records in ascending BARCODE order

You may want a list of all the User Records you have created so you can browse for incorrect barcodes and obsolete records that you would like to flag for deletion in the weekly purge program.

Submit a “blank” Barcode search with Match set at “Any Part”.



Search

for

Match Exact Any part First part Last part

[Reset](#)

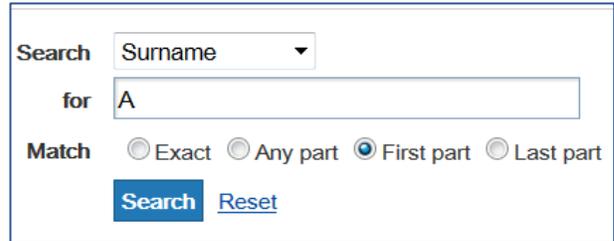
The results will be all your user records in ascending Barcode order.

Example: List user records in ascending SURNAME order

You may want to get a list of user records in alphabetical surname order to see if you have duplicate records for the same patron.

Select “Surname” for the search and enter the letter you want the surname to begin with. (i.e. A or B etc.)

Select “First Part” for the Match.



The screenshot shows a search interface with a dropdown menu set to "Surname", a text input field containing "A", and radio buttons for "Exact", "Any part", "First part" (which is selected), and "Last part". There are "Search" and "Reset" buttons at the bottom.

The results will be all your user record with surname beginning with the letter “A”. They will not be in **strict** alphabetical order but they will all begin with the letter “A”. You might spot duplicate records to investigate for accuracy and/or possible deletion.

Example: List user records with EMAIL addresses

You can get a list of all the user records that have an email address entered in the record. This may be useful if you are considering using the Patron Notification by Email feature in VDX.

Submit an “Email address” search for “@” with Match set at “Any Part”.

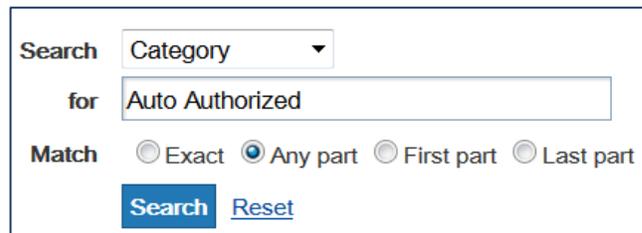


The screenshot shows a search interface with a dropdown menu set to "E-mail address", a text input field containing "@", and radio buttons for "Exact", "Any part" (which is selected), "First part", and "Last part". There are "Search" and "Reset" buttons at the bottom.

Example: List user records for a patron CATEGORY

You can search user records by patron category assignment. This can be useful if you have implemented patron initiated VDX at your library and you want a list of patron records that have been assigned one of the patron self-serve user categories. (i.e. Auto Authorized Patron or Manual Authorized Patron).

Submit a “Category” search for key words in the desired category with Match set at “Any Part”.



The screenshot shows a search interface with a dropdown menu set to "Category", a text input field containing "Auto Authorized", and radio buttons for "Exact", "Any part" (which is selected), "First part", and "Last part". There are "Search" and "Reset" buttons at the bottom.

Edit User Records

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 [Details](#)  [Edit](#)  [Expire](#) [Unexpire](#)

- Select [Details](#) to view the user record in detail.
- Select [Edit](#) to modify the user record.

Note: It is not possible to edit the user barcode. If a patron loses their library card and gets a new one with a new number, a new user record must be created.

Banned in VDX “Yes/No” toggle

You can ban a patron’s VDX user record if they have abused Interlibrary loan or have unpaid fines. VDX will alert you that patron record is banned. The “Banned in VDX: Yes/No” setting can be toggled on or off by staff in the User record.

Expire or Unexpire a user record

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 [Details](#)  [Edit](#)  [Expire](#) [Unexpire](#)

- Select [Expire](#) on search result to expire a user record. This can also be done by entering a date in the expiration date field in the edit screen.



Note: Setting an expiry date gives an error message when trying to create a request for an expired patron.

- Select [Unexpire](#) on search result to if you set an expiry date by mistake, or it no longer applies.

Deleting unwanted user record

Sometimes staff may want to delete unwanted VDX user records:

- you forgot to preface the barcode with your NUC code plus a hyphen (i.e. you entered 0056789 or OHESC 0056789 instead of OHESC-0056789)
- you created a new user record with a new barcode and the record with the old barcode is not relevant any longer (i.e. lost library card, new one issued)
- patron no longer uses your library (i.e. they moved away)



Note: It is not possible to edit the Barcode field once it has been created so if you have made a mistake or that barcode no longer exists, you have to create a brand new VDX user record and the unwanted record clutters up your file of User Records.

Some library staff have made “Obsolete” or “Superseded by” notations to mark the unwanted record and used the “Banned” toggle in an effort to alert staff to avoid using incorrect User Records.

How to flag unwanted user record for deletion

The VDX vendor runs a weekly script file that looks at the beginning of the Surname field for the text “DELETE” and purges those records.

*To flag unwanted user record for deletion type the text **DELETE** at the very beginning of the Surname field, followed by a single space before the Surname.*

Confirm Password	<input type="text"/>
First Name	Caitlyn
 Surname	DELETE Arnold (264-2847)
E-mail	<input type="text"/>
Category	Approved Patron <input type="button" value="v"/>
Join Date	<input type="text"/> (e.g. 1 Sep 2003)

IMPORTANT: You might notice that a record you flagged for deletion is “still there”. VDX will only delete the user record *if ALL requests that user barcode is attached to are completed*. Staff need to complete requests linked to the user (if the requests are done) and you want the user record to be deleted by the weekly script file run.



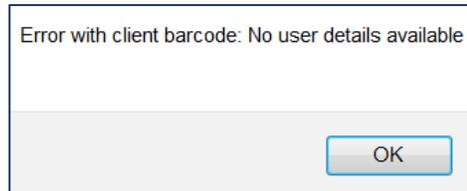
Tip: To see if there are any requests associated with a user that you flagged for deletion do an ILL Request search on Patron Name DELETE. You should get requests that are associated with a user that has DELETE in front of their surname in their user record.

ILL Request Search	
<input type="radio"/>	ILL numbers (ILL no, Local Request Number)
<input type="radio"/>	Item Number
<input type="radio"/>	ISBN / ISSN
<input type="radio"/>	Title / Author Keyword
<input type="radio"/>	Patron Barcode
<input checked="" type="radio"/>	Patron Name
<input type="radio"/>	Request Due Date
<input type="radio"/>	Borrower Code
<input type="radio"/>	Lender Code
<input type="radio"/>	Requests Assigned To Me
Search Criteria	DELETE

Create patron user record “on-the-fly”

Sometimes the Validation of patron's barcode number results in an error.

*You may have entered barcode number incorrectly
OR there is no existing patron user record for that
barcode.*



Library staff may find it easiest to enter patron records 'on-the-fly', as they make requests:

1. Open a second browser from the one you have VDX open in and log in to VDX.
i.e. be simultaneously logged in to your VDX account in Mozilla Firefox AND again in Google Chrome.
2. In the alternate browser window, select **User** in the sidebar menu.
3. Avoid creating a duplicate patron record. Search by 'Barcode' or 'Surname' to confirm there is no record for this patron in case you made a typo when you originally entered the barcode to be validated.

Be sure to enter your library code preface for a barcode search.

i.e. OAQ-123456 not just 123456

4. If user record is not found, select [Create](#) link at top of screen and complete User Details form.
5. Return to primary browser window from your task bar, which should still be open at “Patron Details” section of the request you were creating.
6. Enter patron’s barcode in “Client Barcode” prompt and select '[Validate](#)'. The screen will refresh with the patron information automatically added to the form.

Staff may wish to leave the secondary browser session open to be accessible to add additional patrons “on-the-fly” as they work at creating new requests.

Free-text entry of patron details on requests

Who should make the change?

This configuration is desirable for libraries that do not create VDX user records. Instead, they have been requesting everything with the STAFF default and maintaining paper files to facilitate patron notification for pick up.

How to configure your STAFF user record for free text entry of patron details

1. Select **User** from sidebar menu to display User Search screen.
2. Search by “Barcode”. Enter your STAFF user record barcode (that you log-in to VDX with) and set Match set to “Exact”.

Search
for
Match Exact Any part First part Last part
 [Reset](#)

3. Select [Edit](#) and change “Category” selection from Staff default to **Staff No Validate**.

User ID 647
Barcode OLIV
Password Update Password
Confirm Password
Alternative Barcode
First Name
Surname STAFF Kawartha Lakes - Main
E-Mail
Category 

4. Log out of VDX and log back in again to affect the change.

What are functional advantages in recording patron details on the request

1. A library with their Staff user record configured with “Staff No Validate” user category will get free text entry prompts on request screen, replacing the default Client Barcode and Validate.

Staff can enter name, phone #, Library Card number as needed in Client Name field.

i.e. Karen Carpenter 890-9987 or Karen Carpenter 20034005643 Ph: 890-9987



The screenshot shows a form titled "Patron Details" with a dropdown arrow on the left. It contains three input fields: "Client Name" with the text "Karen Carpenter 890-9987", "Client Email" with "jill@sols.org", and "Amount willing to pay" which is an empty field with a dropdown arrow on its right side.

2. Once request is issued, patron name and email details appear in the request as below.



The screenshot shows a form titled "Patron Details" with a dropdown arrow on the left. It displays the following information:

Name	Karen Carpenter 890-9987
Patron Barcode	OMOL
Patron ID	911
Patron Status	STNV
Email	jill@sols.org

Patron Barcode and patron ID belong to the STAFF user record.

Patron Status STNV stands for “Staff No Validate”

3. Entering the client’s email address is useful for ad hoc Send User Alert to patron



Staff can email patron from the request to communicate status or issues with their request or that it is available for pick-up..

*See Chapter 11: Communications from a request - Send User Alert (emails directly to the patron)

4. Requests are searchable in VDX by patron name

Either Simple Search or Advanced Search by Patron Name will retrieve the patron's requests.

Simple Search | **Advanced Search** | Results | Bulk Action | Create

ILL Request Search

ILL numbers (ILL no, Local Request Number)
 Item Number
 ISxN
 Requested Title
 Patron Barcode
 Patron Name
 Request Due Date
 Borrower Code
 Lender Code

Search Criteria: Karen Carpenter

Records per page: 10

Patron Name search is keyword so any of these entries will work:

- “Karen”
- “Karen Carpenter”
- “Carpenter”

5. VDX Received List becomes a useful workflow tool

Reports	
Received List	12
Returned List	4

Received List slips will include the patron name details as entered in “Client Name” fields on the request to facilitate patron pick-up notification of received items.

Patron Name: Karen Carpenter 890-9987	Barcode: OMOL
Phone:	Pickup Point: Oliver Paipoonge
Email: jill@sols.org	Entered By: STAFF Oliver Paipoonge
Responder Req. No.: 9906310	Cost:
Title: Happy days ; my mother, my father, my sister & me	
Supplier: Elliot Lake	Due to Supplier:

Example of Received List slip with patron name, phone number and email as entered into free text entry prompts when request was created.

It would not be necessary to maintain paper files to perform patron notification. You could elect to go “paperless” after a request is entered into VDX. Your choice. There are still functional advantages to recording patron name on requests even if you continue to maintain paper files.