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## Chapter 4: Create requests from search results

## Import bibliographic details from a search into ILL Request form

Use the [Request](#) link on the desired item to import bibliographic details into a VDX ILL Request form that you complete and submit into the VDX system.



**TIP:** If you selected [Request](#) link prematurely and do not want to proceed with requesting the item simply return to 'Search' in the sidebar and select [Results](#) top row link to return to the brief search results display.

## Completing the ILL Request form

The VDX ILL request form has multiple collapsible sections that can be expanded or collapsed as needed for efficient viewing and editing of the request.



### First, the good news!

For 98% of newly issued requests (if there is an ISBN) you can skip most of the request form sections. Simply add patron details, check pick-up location and submit the request. Done!

\*For full knowledge each section on the ILL request form is explained.

### Request Details

[Request Details](#)

Authorisation Status	To be Authorised
Item Format	Book

- **Authorization Status** displays the default “**To be Authorized**” on a newly issued request assuming user wants *automated mediation* carried out, which is the case 98% of the time. VDX background processors will find libraries that hold the item based on ISBN match and automatically create a Rota (lender string). The collected locations will be sorted using geographic proximity rules. VDX’s background processor will automatically engage the request as “Pending” with the first potential supplier.
- **Item Format** is derived from the bibliographic data in the search result.

### Service Details

[Service Details](#)


Requested Service Type 1		Requested Service Type 2	
Service Type	Loan	Service Type	
Media Type		Media Type	

- **Service Type** will automatically default to (*Loan or Copy non-returnable*) based on whether the item is a monograph or serial. You can override the default service type.

## Item Details

### Item Details (Book)

Use Our Local Number to record your locally defined running number for this request

Our Local Number	<input type="text"/>
Title	Hawks & owls of the Great Lakes Region & eastern North Ameri
Subtitle	<input type="text"/>
Author	Earley, Chris G 1968-
Series Title & Numbering	<input type="text"/>
Sponsoring Body	<input type="text"/>
Publisher	Firefly Books
Place of Publication	Richmond Hill, Ont.
Date	2004.
Edition	<input type="text"/>
Any Edition	<input type="text"/>
Item Description	128 p. : col. ill., col. maps ; 23 cm. 
ISBN	1552979032;1552978478
Volume	<input type="text"/>
UPC	<input type="text"/>
Classmark	<input type="text"/>
Ref. Source	Oshawa Public Library/UNICORN

Use Item Note to send the lender important additional item information like 'Large Print Version' or 'First Edition Only'

Item Note	<input type="text" value="May we have a 6 week loan please."/>
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- **Item Details** shows bibliographic information that is automatically pulled into the form from your search results. If necessary, you can edit this information.
- **Our Local Number** field allows you to record a local request number in addition to the number allocated by VDX. You will be able to retrieve the request by searching for this number if required. This field is optional and is provided for libraries that have an additional request tracking system outside of VDX.
- **Item Note** is for additional information about the request that is relevant to any potential suppliers that may be handling your request.

## Rota Details

Rota Details

**Holdings** Found

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Available Selected

Oshawa - Main  
Oshawa - Legends Centre Branch

→ Add  
← Remove

↑ Up  
↓ Down

Select All Deselect All

Library symbol or location name:  Search

In a brand new request, the “Available” tab will display locations identified in the bibliographic record that you selected for the request.



### Do you “do something” with Rota Details holdings or don’t you?

1. **NO... 98% of the time... No**

Majority of newly created requests will have an ISBN in the record so you skip right on past the “Rota Details” section without a glance. In this example, VDX background processor will collect “Oshawa – Main” but potentially many additional locations that are an ISBN match for the requested item.

2. **YES... occasionally**

If you want the request to come specifically from location(s) listed in ‘Available’ column *then you must control where request goes* by selecting a location and use Add arrow to move it to the “Selected” column. You would submit request “Authorized” to bypass VDX’s automated background processor. This would be appropriate when:

- there is no ISBN in the record (*therefore VDX will not be able to build a Rota for you*)
- a library set item aside for you so you want request directed to that location only
- you know the library lends that item format (i.e. DVD)

## Notes added to a VDX request

### Notes

Use Private Note to add notes that will only be seen by staff at your library

Private Note

Use Patron Note to pass a message to the patron (eg. the item is now available for collection)

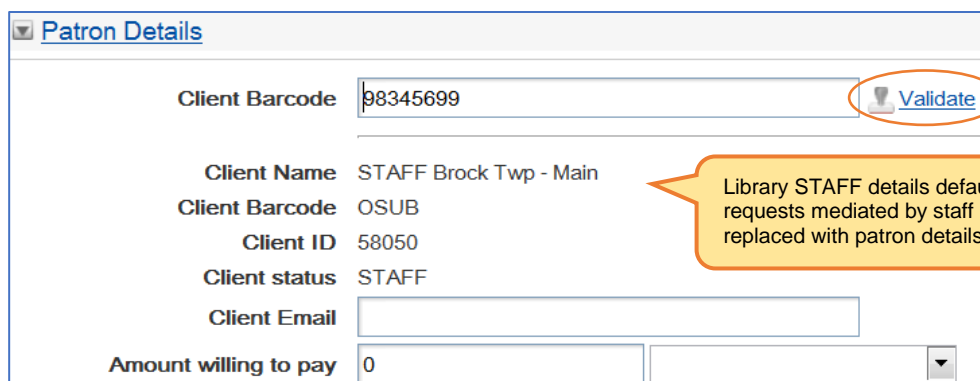
Patron Note

- **Private Note** - this note is *not* sent with the request to potential suppliers. It can only be seen by the requesting library staff.
  - i.e. Mrs. Jones is reading whole series, stagger requests in order.
  - i.e. Book jacket torn when this item arrived.
- **Patron Note** - this note will display to your end user when they look at 'My Requests' in the ZPORTAL interface or staff use the VDX Send User Alert action on the request to email the patron.
  - i.e. This item is now available for pick-up at Hedley Branch

## Patron Details – 2 methods for adding patron details

If you do not add patron details to a request, the staff member logged in when creating the request will be the default patron in the request. There are two methods for applying your patron's details on the ILL request form.

**Method 1: Enter patron's barcode and select [Validate](#) link if your library creates User records for your interlibrary loan users.**



Patron Details

Client Barcode  [Validate](#)

Client Name STAFF Brock Twp - Main

Client Barcode OSUB

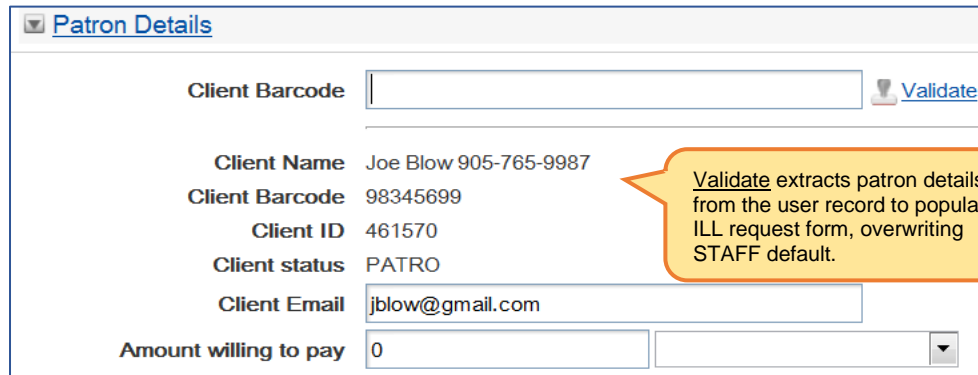
Client ID 58050

Client status STAFF

Client Email

Amount willing to pay

*Example of ILL request form prompt if library creates user records.*



**Patron Details**

Client Barcode  [Validate](#)

Client Name Joe Blow 905-765-9987

Client Barcode 98345699

Client ID 461570

Client status PATRO

Client Email jblow@gmail.com

Amount willing to pay 0

*Validate extracts patron details from the user record to populate ILL request form, overwriting STAFF default.*

Example of ILL request form AFTER Validate has been successful.

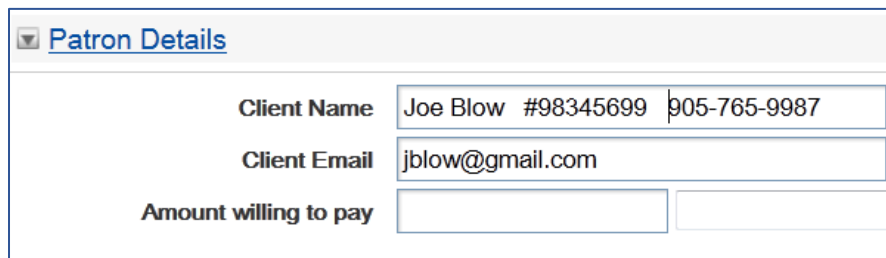


**Note:** If you get “**ERROR with client barcode: no user details available**” after selecting [Validate](#) then the user record does not exist and you will need to create one.

\*See Chapter 15: User Records in VDX - Creating VDX user records

### Method 2: Free-text entry of Patron Details on requests

If your location is not creating VDX user records to “Validate” against you can elect to use free-text entry of patron details on the request form.



**Patron Details**

Client Name Joe Blow #98345699 | 905-765-9987

Client Email jblow@gmail.com

Amount willing to pay

Example of request screen configuration for free-text entry of patron details

This configuration has **multiple benefits** over leaving the STAFF default on requests and having to consulting paper files for patron information:

- you can perform VDX request searches by patron name
- VDX Received Report becomes a useful workflow tool
- you can enter an email address to use VDX’s Send User Alert action
- you do not need to maintain a paper filing system

\*See Chapter 15: User Records in VDX - Free-text entry of patron details on requests

## Additional Service Details

Most of the fields in this section of the form are defaulted from rules specific to your location. The defaults cover 98% of your requesting. If you add any information in this section, it will override the defaults within VDX.

Fields will be "blank" defaults. They are only filled in on this example so you know what the defaults are

*Example of Additional Service Details section with "blank" system defaults illustrated*

- The good news is that 98% of requests do not need any adjustment in the Additional Service Details section.
- If no Service Details are chosen, the VDX *blank* system default will be used. You do not need to make selections unless you want to override the *blank* system default settings as shown above.
- Max. Cost field (optional) indicates the most you will want to spend to receive this item.
- VDX will send an Expiry Date to the responder, indicating how long the responder can hold the request before it moves on to the next responder. How VDX calculates the expiry date for each responder is normally set by default and should not be changed without a specific reason.



**Tip:** For more information on Service Details see **Appendix 3: Service options further explained.**

## Delivery Details on the request

Default **Delivery Method** is Postal Delivery. If no alternate delivery method is chosen, the VDX *blank* system default will be used.

- For all libraries the *blank* system default is 'Postal Delivery'

If your users can pick up their requested material at more than one location, you will see Pickup Location options. The appropriate pickup location can be selected here.

## Authorization status – check prior to submitting the request

Check the **Authorization Status** at top of request form before you submit request.

There are exceptions but in nearly every circumstance, for new requests that contain an ISBN, you leave the Authorization status at the default **“To be Authorized”** so that request will be passed to VDX background processor that builds the Rota (lender string) based on ISBN match, and then auto-authorize request to first potential supplier.

**Chart: Submitted Authorization Status for various scenarios**

<b>Frequency</b>	98% of new requests	Occasionally	Occasionally
<b>ISBN in record?</b>	With ISBN in record	No ISBN in record	With ISBN in record
<b>Submitted Authorization Status</b>	<b>“To be Authorized”</b>	<b>“Authorized”</b>	<b>“Authorized”</b>
<b>Rota control</b>	VDX controls Rota creation	Staff controls Rota creation	Staff controls Rota creation
<b>What happens</b>	VDX background processor auto-mediate, collecting ISBN match locations for Rota and automatically engages request with first potential supplier.	Staff manually create the Rota because VDX background processor would “bomb” because no ISBN to work with.  If staff notice there is no ISBN and take control at this stage, they can circumvent request becoming Idle/Check Manual with log message: “Item not located – Rota is empty.”	Staff manually create the Rota, selecting specific location(s) they want request to route to.  e.g. you know location lends the item format (i.e. DVD)
<b>See for more information</b>	*See Chapter 5: Rota Creation - How VDX builds a Rota for your request	*See Chapter 5: Rota creation - No ISBN in record - so how do you get a Rota?	*See Chapter 5: Rota creation - Manually create the Rota, bypassing VDX auto-mediation



## Request Successfully submitted screen

### [New Request](#)

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### Request Result

Your request has been successfully submitted.

The system has assigned an id of **15224950** to the request.

Use the [Requests](#) option to track the status of this request.

### Request Details

-- LOAN Request -- 04 Nov 2017 --

Request Number:	15224950
Title:	Hawks & owls of the Great Lakes Region & eastern North America
Author:	Earley, Chris G 1968-
Date of publication:	2004.
Further Information	
This item is not needed after:	22 May 2018
Item Note:	Need 8 week loan please



### To print or not to print....

- It is completely unnecessary to print the request confirmation slip as you can always find your requests in VDX with a request search by request number, title, or patron name or under a status category in the Work Queue.
- However, if a paper copy is required, the print-out will contain request details, patron details and any additional notes that were added to the request form.