Chapter 5: Rota creation

How VDX creates a Rota for your request

VDX passes **"To be Authorized"** requests to the VDX background processor to create a list of holding libraries (called a Rota) for request to be routed to.

1. **Collects locations** – first DocFind collects locations from all targets that are a match for the ISBN, ISSN, or LCCN in the record. If there is no number in the record that has been submitted the VDX background processor cannot work with it to collect locations and a Rota does not get built.

2. **Sorts locations** - next VDX background processor sorts the collected locations based on a profile for your library set up at the system administrative level. Geographic proximity is a factor in sorting rules.

3. **Sends request** - If the Rota is successfully created the request is automatically sent to first location on the Rota. The status changes from **Idle** to **Pending** until a Responder takes action.

   If the first library cannot supply, the request automatically routes to next library and so on until a lending library responds that it will supply the item or the request reaches the end of the Rota without being supplied.

Borrowing staff have nothing further to do until the item arrives from a supplier or request appears in the Work Queue "End of Rota" category.

What if a Rota creation is not successful?

If request does not meet requirements or a Rota is not successfully built, it remains **Idle** and the Authorization becomes **Check Manual.** It will need to be checked and further manipulated by library staff to get it going.

*See "Idle/Check Manual request processing"

No ISBN in record - so how do you get a Rota?

Where there is a choice you would select a search result containing an ISBN. However, sometimes you only get search results for items that do not have an ISBN or ISSN. The VDX background processor will not build a Rota for these so the operator must take control and manually "create the Rota".

1. Select locations from Holdings "Available" column and use **Add** arrow to move them to Holdings "Selected" for Rota column.

2. If you want to add additional known locations, use the "**Library symbol or location name**" search to enter a library name or symbol. Locations matching your search term will be displayed as "Found". Select the location(s) you want to add to the Rota and use **Add** arrow to move them to "Selected" selected for Rota column.

   Remember! Never add branches, only centralized "Main" locations.

3. Before submitting the request, change Authorization Status to **Authorized.**

   - You are taking control of the request by authorizing it to locations you have selected for the Rota.

   - Authorized requests bypass the VDX background processor so the request will not queue under Idle / Check Manual due to lack of an ISBN for Rota building.

3. Select 'Request' button to submit. VDX will take the location(s) you selected to create the request Rota and engage the request with the first lender.

Manually create the Rota, bypassing VDX auto-mediation

Even with an ISBN in the record, there may be occasions where you want to prevent the VDX background processor from building a Rota.

You may want to avoid the request automatically being sent to the first location in a Rota without having an opportunity to see who that is.

Perhaps you have negotiated that a book club title be set aside for you at a certain library so you just want the request to go to that specific location. Or perhaps the request is for a non-print format (i.e. DVD) and you want to control the Rota to contain locations who have indicated they are willing to lend that format.

To take control, the steps are:

1. Select desired location(s) from 'Available' column (and use **Add** arrow) to move to the "Selected" column.

2. If there are no holdings displayed in 'Available' column but you know where you want to send the request, enter library name or symbol in "**Library symbol or location name"** prompt and click on 'Search' button.

   Enter additional known locations manually if there are more than what displays in the search result.

   You can change the order of locations with 'Move to Top, Up, Down, Move to Bottom' arrows.

In this example, user could type "Oakville" or "OOAK" if you know the library symbol.

3. Before submitting the request, change the Authorization Status at the top of the request screen to **Authorized**.

Remember! Some libraries have branch display in the database. When using this manual Rota creation procedure **YOU MUST BE CAREFUL** that you select locations that are **"Main"** centralized ILL location. Do NOT select a branch, which will not map to the parent location when you are not involving the VDX background processor.