
Chapter 6: Request search methods

Simple Request Search

The Simple Request Search interface provides a quick index search to find currently active requests in process. It is optimized for speed.

ILL numbers search is the only Simple Request Search method that will retrieve both current and completed requests. Other methods, like Title/Author keyword or Patron Name will only retrieve currently active requests in process.

1. Select **Requests** in sidebar menu. VDX presents the default Simple Request search screen.
2. Select retrieval method (i.e. ILL numbers, Title/Author keyword, Patron Name).
3. Enter 'Search Criteria' and use 'Submit' button.

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ILL Request Search

- ILL numbers (ILL no, Local Request Number)
- Item Number
- ISBN / ISSN
- Title / Author Keyword
- Patron Barcode
- Patron Name
- Request Due Date
- Borrower Code
- Lender Code
- Requests Assigned To Me

ILL Number is the only Simple Search that will retrieve BOTH currently active and completed requests

Search Criteria

Records per page

[Reset Form](#)

Example of search for current requests for patron with surname "Carruthers"



Remember: If a requested item may have been returned to the lender and checked-in for completion it can't be retrieved with the Simple Request Search interface, except by ILL number.

*See '**Advanced Request Search**' for finding completed requests with other retrieval methods.

Advanced Request Search

Advanced request search allows you to limit searches and combine conditions to do more refined searches.

1. Select **Requests** button in the left menu. Then use **Advanced Search** link at top of screen.

The screenshot shows the 'Advanced Request Search' interface. At the top, a navigation bar includes links for 'Simple Search', 'Advanced Search' (highlighted with a box labeled '1'), 'Results', 'Bulk Action', 'Create', 'Saved Searches', and 'Work Queue'. Below this is the 'ILL Request Search' section. On the left, under 'Your Library's Role', there are radio buttons for 'Responder', 'Requester', and 'Both' (selected, labeled '2'). Below that are checkboxes for 'Display sent messages only', 'Display Terminated requests', 'Display Not Supplied requests', and 'Display circ error requests only' (grouped with a box labeled '3'). Further down are radio buttons for 'Do not include Completed requests' (selected, labeled '4'), 'Include Completed requests', and 'Completed requests only'. On the right, under 'Request Status', there is a dropdown menu with options like 'Awaiting Automated Acceptance', 'Borrower Received', etc. (labeled '5'). Below this are dropdowns for 'Authorisation Status', 'Last Action', 'Any Action', 'Service Level', 'Requested Service Type 1', 'Log Message Type', and 'Circ. Error Type' (grouped with a box labeled '6'). At the bottom right, under 'Other fields', there are dropdowns for 'Patron Name' (Smith), 'Lender Code' (OTAR), and 'ILL Numbers', with 'And' and 'Or' operators (labeled '7'). At the bottom left, there are 'Sort by' dropdowns (one set to 'ILL Number', labeled '8'), radio buttons for 'descending' and 'ascending', a 'Format' section with 'Standard' and 'Print' options, and a 'Records per page' dropdown set to '10'. 'Submit' and 'Reset Form' buttons are located at the top right and bottom right of the form area.

2. Select **Your Library's Role**, either:

- Responder - for incoming requests sent to you from other locations.
- Requester - for outgoing requests that you want to borrow from other locations.

3. Make **Display** selections as appropriate

- Display Sent Messages only - requests that have been sent to potential lenders. Requests with Idle status will not be displayed when this box is checked.
- Display Terminated requests – to include requests that have been cancelled.
- Display Not Supplied Requests – to include requests that were not filled. If this box is not selected, VDX will not show “Not Supplied” requests as they are no longer active.

4. Make **Do not include** or **Include** selections as appropriate.
 - Do not include Completed requests – by default VDX does not display completed requests
 - Include Completed requests – search will include requests in a completed state
 - Completed requests only – search will only contain completed requests
5. Request **Status** allows you to select single or multiple status types for a search. To request multiple, hold <Ctrl> key while selecting from the list.
6. Combine elements for your search from any of the 'Request Status' pull-down menus.
7. Make use of **Other Field** drop-down menus with Boolean operators.
8. Use **Sort by** options to sort your results in descending or ascending order.

Examples of using Advanced Request Search:

<u>Role</u>	<u>Looking for</u>	<u>Formula</u>
Requester	Find pending item with an 'Answer Hold' indication so you can follow up with the lender or cancel if it has been an overly long wait time.	Status = Pending <i>combined with</i> Last Action = Answer Hold Indication
Requester	Find outstanding Microfilm orders for specific patron.	Status=Pending <i>combined with</i> (Other Fields) Client Barcode= OARM-0695000084646 Boolean Operator AND Responder symbol= OTAR (Archives of Ontario)
Requester	Find requests in all states for specific patron	Display Not Supplied requests Include Completed requests <i>combined with</i> (Other Fields) Patron Name = Surname (or do a Client barcode search if you prefer)
Responder	Find items that you shipped to Waterloo Public Library within a certain date range.	Status=Shipped <i>combined with</i> (Other Fields) Borrower Code = OWT Boolean Operator AND Date Shipped= 10 Jun 2017-20 Jun 2017
Responder	Find returned items that may have slipped by the Interlibrary loan Department and were not processed with VDX 'Checked In' for closure. TIP: Ascending sort displays oldest Returns on top to quickly see if something was returned months ago.	Status = Shipped <i>combined with</i> Last Action = Returned-Indication <i>combined with</i> Sort By= Last Action Date ☉Ascending

Entering dates in your request searches

To search within a date range using any of the date fields you can use the following format:

- For a date range from the first of June to 7 of October enter: 1 Jun 2016 – 7 Oct 2016

- For just the day of June 1st enter: 1 Jun 2016

Work Queue Category browse to find request

It is always an option to browse through the work queue category until you find the request you are looking for. This is practical if there are not a huge number in the category.

Example: You have 6 new items that arrived today that need to be updated to 'Received'.
You have 15 requests in your borrower work queue "Shipped" category.

It may be just as fast to browse for the ones you want on the category results screen as it would be to type in a request number or Author/Title keyword search for 6 requests.

Sorting and Printing Request Search Results

You may want to sort request search results alphabetically by title, last action date, or current responder name etc. to facilitate browsing.

- (a) Select "Sort by" criteria and submit.
- (b) You can print the list by using [Print](#) top row link.

[Simple Search](#) | [Advanced Search](#) | [Results](#) | [Bulk Action](#) | [Create](#) | [Saved Searches](#) | [Work Queue](#) | [Print](#)

Results for: Advanced Search

Sort by: Last Action Date descending ascending [Sort](#)

Sort by: descending ascending

Number of Results: 50+

Bulk Action: [Select](#)

Bonnechere:9933822 / GuelphMN:9930893

What really helps - using mindfulness and compassionate presence to help, support, and encourage others
Wegela, Karen Kissel;Wegela, Karen Kissel How to be a help instead of a nuisance. | ISBN: 9781590308806 (pbk.);1590308808
Status: **Shipped**: Authorisation: **Read** Last Action: **Returned-Indication:15 Jun 2011**

WaterlooMN:9981736 / GuelphMN:9981679

The twilight of courage - a novel
Thoene, Bodie 1951-;Thoene, Brock 1952- | ISBN: 0785281967;9780785281962
Notes: No charges, please.,
Status: **Shipped**: Authorisation: **Unread** Last Action: **Returned-Indication:18 Jun 2011**

GreyHighMN:10217740 / GuelphMN:10216540

The five secrets you must discover before you die
Izzo, John B (John Baptist), 1957- | ISBN: 9781576754757 (pbk.);1576754758 (pbk.)