Chapter 8: Borrowing Request administration

Pending Requests

If a request Rota is built successfully the request is automatically sent to first location on the Rota and the status changes from **Idle** to **Pending**.

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

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

Conditional – Responding to a loan offer with conditions

Conditional loan offers from potential lenders will queue under 'Conditional' in the Borrower Work Queue for 3 working days after a supplier sends a conditional answer.

Tip: Before responding, select **Details** to view request History section to see what loan conditions were sent. Often a supplier will elaborate on loan condition with a Public Note.

Also, check Rota Details. Are there other locations to go to besides the current responder who is offering you a conditional loan? It might affect your 'Yes' or 'No' decision when you reply to the Answer Conditional-Indication.

1.   Depending on your decision, select **Conditional Reply-Yes** or **Conditional Reply-No** from the 'Available Actions' drop down menu.

    (a) If you respond with **Conditional Reply – No** and there are other locations in the request Rota it will be moved on to them.

    (b) If you respond with **Conditional Reply – Yes** the lending library will follow up by shipping the item. The status will be 'In Process' with 'Last Action: Conditional Reply-Yes-Indication'.

Note: If requesting library does not send a Conditional Reply within 3 working days the request will expire at current responder location and automatically move on to the next Rota location or will become 'End of Rota' if there are no other locations.

Cancelling a request

You can cancel a 'Pending' request at any time until it has been received.   There are 2 types of request cancellation, each one intended for specific circumstances.

1. Cancel   (Standard for ISO interactions; not used on internal INFO network requests)
2. Cancel Now   (new in VDX 9.1, does not require lender response to move it on in Rota)

Cancel (used for ISO transactions outside of INFO network)
The ISO standard "Cancel" action asks the lender to agree to a cancellation- and does not actually cancel the request until the Lender responds with a Cancel-Reply=Yes.
When a requesting location uses the standard "Cancel" request action the status of the request becomes "Cancel Pending" in the Borrower Work Queue until the Responder confirms cancellation Yes or No.

Cancel Now (used within INFO to cancel with current responder but move on in the Rota)
VDX has a new variant of the "Cancel" action for use with internal consortia laser transactions called "Cancel Now". The "Cancel Now" action cancels the current transaction immediately with the current responder (without asking for agreement from the current responder) and moves the request on to the next potential lender in the Rota right away.

Note: "Cancel Now" is *NOT* available or appropriate for ISO ILL transactions that are conducted with institutions outside of INFO's Ontario public library group because the ISO ILL protocol only supports the mutually agreed form of Cancel operation, which requires lender confirmation of the cancel.

Terminating a Request

When you no longer want a requested item to be supplied by any lending institution, the "Terminate" action should be used instead of Cancel. Terminating a request cancels the request with the current responder and does not forward the request to the next location on the Rota.

Terminate action does two things:

1. Sends a Cancel to lender so they know to stop work on the request.
2. Moves request from "Pending" category to "Terminated" category on Borrower Work Queue.

   Requests remain in "Terminated" queue until staff no longer wants a record. Staff can apply "Complete" action on older terminated requests to clear them from Work Queue.

Shipped

When a lending library updates the status of your request to 'Shipped' the request moves from 'Pending' category to 'Shipped' Work Queue category.   Staff waits for the item to be delivered and will then perform Received processing.

Receiving Items at Requester Location

When a requested item is received, the request needs to be updated with the **Received** status. The item is usually accompanied by a paper copy of the request. This paperwork will include your library's ILL number.

Example of Standard Shipping Report printout sent from the lender with the item.


```
            Cambridge - Main Public Library
    TO: Cambridge - Main Public Library
        1 North Square
        Cambridge, Ontario
        N1S 2K6


        Request Date: 16-JUL-2021
        Date Shipped: 22-JUL-2021
    Delivery Method: Postal Delivery
        Billing Method:                                   Cost: .00

    Please quote responder number [18089070] on any inquiries

    Your original request number is [18089069]

        Author: Unger, Lisa 1970-
            Title: Heartbroken ; a novel
```

1. Search for relevant request with any of the following methods:

    (a) ILL Request search by ILL numbers found on accompanying paperwork
    (b) ILL Request search by Title / Author Keyword
    (c) Browse 'Shipped' category in Borrower Work Queue until you find the request

2. Select **Received** from 'Actions' drop down menu on the request and click on Action button.

3. This displays an **Action: Received** screen.

    (a) Change Received date if relevant.
    (b) You can enter a Public note which will be sent to the lender or Private Note for your staff use only.
    (c) Submit the received action.

4. Proceed with patron notification procedure and forwarding item to pick up location (circulation desk, a branch, etc.)

Patron Notification for Received Items

When items have been received they queue in the **Received List** report, available from the Borrower Work Queue.

Reports	
Received List	2
Returned List	0

Select hyperlink number in the **Received List** indicator on the Borrower Work Queue and print the report.

The report contains printable slips with patron contact information and pickup location. There are up to five received item slips per page. The slips can be cut to insert in the books for staff making patron pick-up arrangements.

Received Report Details

- **Telephone Number**
  The phone number field is filled in on the report from "Client Home" section of patron's record if you have entered data. Note: Many libraries are saving steps in patron user record creation process by adding the phone number in brackets after the patron's surname.

- **Email**
  If your library has the optional 'patron notification by email' feature activated then any patrons with an email address in their user record will automatically receive an email notification to come to the library to pick up their item when library staff perform the 'Received' action on a request. The absence of an email address on the Standard Received report indicates that a phone call is necessary.

- **Pickup Point**
  Staff can redirect material from the centralized ILL location to the location where patron will be picking up the item.

- **Due Date**
  Interlibrary Loan or Circulation department staff can determine patron's due date based on "Due to Supplier" date.

- **Entered By**
  Indicates who placed the request. In the example below the request was placed by Middlesex County staff on Jane Doe's behalf. If Jane Doe was using the Zportal patron interface to VDX to place her own ILL requests then the 'Entered By' field would display "Jane Doe".

Example of Standard Received Report

Patron Name	Jane Doe (432-1234)	**Barcode:** OARM-06495000143541
Phone:		**Pickup Point:** Middlesex County - Glencoe
Email:		**Entered By:** STAFF Middlesex County - Main
Responder Req. No.:	3292927	**Cost:**
Title:	Murder on Washington Square ; Berkley Prime Crime book.	
Supplier:	Essex County - Main	**Due to Supplier:** 20-SEP-2006

Local Circulation procedure for borrowed ILL item

The procedure that a borrowing library develops to notify patrons to pick-up interlibrary loan items and to circulate it will vary from library to library. Most libraries temporarily add borrowed ILL items to their collection and circulate them using their ILS, recording circulation statistics and ability to track ILL items.

Creating a Brief Add title record
Some libraries create a 'brief title record' meaning this title record will only exist as long as the ILL item is circulated at your library. Once it is returned to the owning library, you delete the record or keep it for statistical purposes.

Generic Method
Some libraries have adopted a "generic" method of circulating borrowed ILL items through their ILS without doing an 'Add Brief Title'. It is minimal work, providing a circulation statistic and a "heads up" to patron that there is an ILL item for pickup if they have not yet received their notification phone call.

1. Have a set of 3x5 index cards with barcodes on them. The title is a generic "Interlibrary Loan Item". The barcodes are re-usable.

2. ILL item arrives and is processed with "Received" action in VDX and the VDX Received report is printed, providing a slip of paper with requesting patron's name, due date etc.

Patron Name: Jane Doe 271-3127	**Barcode:** OFF
Phone:	**Pickup Point:** Fort Frances
Email:	**Entered By:** STAFF Fort Frances
Req. No.: 15538918	**Cost:**
Title: Consilience ; The Unity of Knowledge	
Supplier: Powassan & District Union	**Due to Supplier:** 31-AUG-2017

3. Clip a generic "Interlibrary Loan Item" 3x5 index card inside the borrowed item with this received slip.

4. Check it out to the patron in question. Use the due to supplier date on the VDX slip, backing it off by a few days to allow for return time to the lending library.

5. Phone the patron to come to library to pick up their ILL item. Then place the item on the pick-up shelf.

6. Before getting the pickup notification phone call, should the patron be looking at their user record online from home or happen to be in the library checking out other items, staff can alert them that there is an "Interlibrary Loan Item" awaiting pick-up. They won't be able to tell them the title, just that it is an interlibrary loan item. This saves the patron a return trip to the library.

7. When patron returns the ILL item, discharge it from the patron's record. The 3x5 index card with barcode is saved/recycled for re-use.

Renewal – requesting extended due date

Common practice is to allow the patron to keep the interlibrary loan item while you pursue a renewal. If the lender denies a renewal or if they send a 'Recall' status the borrowing library must obtain the borrowed item from the patron and return it promptly.

1. Find the request by patron name, title, request number, or browse the 'Received' category in your Borrower Work Queue.

2. Select **Action** button on request. Select **Renew** from 'Available Actions' drop-down menu and submit.

3. Respond to the prompts in **Action: Renew** screen and submit.

ILL Request

Action: Renew

Our Number	15224724
Status	Received
Title	The Kent chronicles
Author	Guerdon, Trueblood;Katzin, Lee H;Mayberry, Russ;Hayers, Sidney 1921-2 Andrew 1955-;Bosley, Tom;Johnson, Don 1950-;Neal, Patricia 1926-2010. Media (Firm)
Desired Due Date	25 nov 2017 (e.g. 10 Jun 2009)
Public Note	Patron requested 2 week extension on due date so they can finish a school project. Thanks JP

Enter a Desired Due Date.

Add a note if appropriate.

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4. Request status updates to "Renew/Pending" and request queues under Renew/Pending category in Borrower Work Queue.

5. The lender's renewal response reverts status to 'Received' and Last Action: field indicates if renewal was granted or denied. Monitor lower right section of Borrower Work Queue, especially for "Renewal Denied – Borrower".

Published Saved Searches	
Name	**Count**
Idle - Locally Held	2
Renewal Denied-Borrower	0
Renewal Granted-Borrower	1
Reported Lost by Borrower	6
Reported Lost by Lender	0

Returning an Item to the Lending Library

When the patron has finished with an interlibrary loan item and returned it to the library it is processed in VDX for return to the lending institution. The request status is updated to 'Returned' on both the borrowing and lending view of the request.

1. Search for relevant request with any of the following methods:
   - (a) ILL Request search by ILL number
   - (b) ILL Request search by Title / Author Keyword
   - (c) Browse 'Received' category in Borrower Work Queue until you find the request

2. Select **Returned** from 'Actions' drop down menu and click on Action button.

3. Make any required changes to **Action: Returned** form (change return date, add any notes) and Submit.

Tip: You can use Bulk Action processing when performing the Returned action.
*See Chapter 7: Bulk Action processing multiple requests

Returned Report Packing Slip

Each item updated to returned is added to the **Returned List** report which can be printed from the Borrower Work Queue.

Reports	
Received List	0
Returned List	2

Select hyperlink number in the **Returned List** indicator on the Borrower Work Queue and print the report.

Returned Report Details

- This report produces a "Thank You" insert and shipping label for each item to be returned. It prints two returned item slips per page.

- The responder's request number is on the "Thank You" slip to facilitate their "Check-In" action when they get the item back in their possession.

- Cut off the To: address block above the cut line to tape to the parcel.

- **The lending library should have provided a return postage pre-paid self addressed return label.**

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✂
Cut line

> Guelph - Main Public Library
> TO: 100 Norfolk Street
> Guelph, Ontario
> N1H 4J6

Address label to tape to parcel

> FROM: Waterloo PUBLIC - Main Public Library
>
> ### Thank you for the use of this material.
>
> Request Date: 07-JUL-2021   Request Number: 18076931
>
> Status Change Date: 09-AUG-2021   Responder Number: 18076953
>
> Title: The Rift coda ; Foster, Amy Susan. Rift uprising trilogy ; 3.
>
> ILL Notes:

Thank You packing slip to travel with returned item.

Interpreting request transaction History and Log Messages

Looking at a request in **Details** view allows you to examine the request History and Log Messages as well as Rota Details.

Any underlined status in the 'Action" column indicates that a note was included with the status update. Selecting the underlined link will open the details of the note in a popup window.

Below is the transaction History of a request currently in a "Received" state.

Rota Details

Seq	Location		Status
1	Hamilton - Main		
2	Cambridge - Main		
3	Ottawa - Main		
4	Toronto - Reference Main		

Current rota location is highlighted

History

Lender	Action	Status	Date Changed	Authorised By
Ottawa - Main	Received	Received	27 Feb 2017 14:22:34	STAFF Richmond Hill - Main
Ottawa - Main	Shipped-Indication	Shipped	07 Feb 2017 10:37:30	
Ottawa - Main	Answer Will Supply-Indication - in process	Pending	03 Feb 2017 09:16:01	
Ottawa - Main	REQUEST	Pending	02 Feb 2017 16:05:46	
Cambridge - Main	Answer Nonsupply-Indication - policy problem	Not Supplied	02 Feb 2017 16:05:41	
Cambridge - Main	REQUEST	Pending	02 Feb 2017 15:57:54	[system - Auto-Mediator]
Hamilton - Main	Suspended	Idle	02 Feb 2017 15:57:44	[system - Auto-Mediator]

Log Messages

Date	Description	Message
03 Feb 2017 09:16	Expiry date warning	Will-Supply-Date may be later than Expiry-Date
02 Feb 2017 15:57	Location currently suspended	

Read the request transaction History from the BOTTOM UP:

1. **Hamilton** got the request first.
   Their lending was "Suspended" at the time so [system-Auto-Mediator] automatically moved request on to next potential supplier.

2. **Cambridge** became next 'Pending' location for the request.
   They responded "Answer Non Supply-policy problem" which caused request to move on to next potential supplier.

3. **Ottawa** became next 'Pending" location for the request.
   They responded "Answer-Will Supply-in process" which held the request for them while they investigate availability at a branch.

4. **Ottawa** subsequently upgraded to 'Shipped" status a few days later.

5. "Received" action was applied by staff at borrowing library when item arrived from Ottawa.