
Chapter 9: Inactive and not supplied Borrower requests

Idle / Check Manual request processing

Borrower	
Status	Count
Idle / Check Manual	5
Idle / Auth Manual	7

Idle requests do not go anywhere until staff intervenes.
Monitor **Idle/Check Manual** queue daily and “get them going”.

When a request is submitted “**To be Authorized**” it is passed to the VDX background processor for auto-mediation (Rota building, duplicate request check etc.). When a request cannot be validated or a Rota cannot be built, the request is written back to request database as **Idle / Check Manual** for staff review.



IMPORTANT! Staff should process Idle requests on a regular basis (daily is best practice). Use [Details](#) to examine request History and Log Messages for clues.

What are the possible reasons for Idle/Check Manual:

1. No ISBN

When there is no ISBN or ISSN for the VDX background processor to work with it cannot build a Rota.

Log Messages	
Date	Description
23 Oct 2017 15:52	Item not Located - Rota is Empty

Recommended action:

Perform a new bib search to see if there is another suitable result to meet patron’s need that has an ISBN. If search successful, create a new request and “Complete” the Idle request.

If you can’t find another bib result with an ISBN, follow steps for manually creating request Rota described in “No ISBN in search result - so how do you get a Rota?”

2. Possible duplicate request

If your library has been configured for optional elective “Alert staff of duplicate request” then questionable requests will queue in Idle/Check Manual so that staff can investigate.

Log Messages		
Date	Description	Message
04 Nov 2017 20:32	Validation	This request may be a duplicate of request no: 15224918

Recommended action:

Examine duplicate request number provided. If it is a genuine duplicate (same item for same patron) then “Complete” the Idle request.

If you want the request to go through, select “Request” from list of Available actions on the Idle request. Leave Authorization Status set to “Authorized” and submit request.

3. Location is a non-responder

Sometimes there is no Rota even with an ISBN in the bib record used to create the request. VDX background processor may have collected locations for a Rota that were skipped over because their ILL service is temporarily suspended. Sometimes it is because a location does not provide loan services. This happens if staff mistakenly selected a non-responder branch location when manually creating a Rota.

History			
Lender	Action	Status	Date Changed
Bruce County - Lucknow	REQUEST	Idle	31 Oct 2017 19:08:35
	Location Skipped		31 Oct 2017 19:08:34

Log Messages	
Date	Description
31 Oct 2017 19:08	End of rota reached
31 Oct 2017 19:08	Location is not a Responder

Note: A callout box points to the 'Bruce County - Lucknow' lender in the History table, stating: 'Staff used a non responder branch location instead of Bruce County-Main centralized ILL location'. A dotted arrow points from this callout to the 'Location is not a Responder' message in the Log Messages table.

Recommended action:

Select "Request" from list of Available actions on the Idle request. Leave Authorization status set to "Authorized". Advance to "Rota Details" section. Search for Main centralized ILL location using "Library symbol or location name" prompt. Manually [Add](#) it to "Selected" for Rota column. Submit request.

4. Possible locally held item

If your library offers patron initiated interlibrary loan you will have "Trap locally held" configured for your location. It prevents patron issued requests from automatically entering the system for something you have in your own collection. Local location on Rota requests will remain Idle for staff review.

Log Messages		
Date	Description	Message
27 Oct 2017 13:58	Local location on Rota	Kawartha Lakes - Main - Lindsay

Note: A callout box highlights the 'Local location on Rota' description, with a dashed arrow pointing to the 'Message' column.

Recommended action:

If you want the request to go through, remember to remove your own location from the Rota before authorizing the request. Select "Request" from list of Available actions on the Idle request to open in edit mode. Leave Authorization status set to "Authorized". Advance to "Rota Details" section. Use [Remove](#) arrow to remove your own location from the top of the "Selected" for Rota column. Submit request. Your request will now have a "Pending" status and will be engaged with the first responder on the Rota.

If you do not want to pursue the Idle request, use "Complete" action on it to remove it from your work queue.



Note: It is appropriate to use 'Complete' action on "Idle" requests because they are not actively engaged with a responding library. Completing removes request from active request display.

Idle / Auth Manual request processing

Borrower	
Status	Count
Idle / Check Manual	5
Idle / Auth Manual	7

Idle requests do not go anywhere until staff intervenes. Monitor **Idle/Auth Manual** queue daily and “get them going”.

Idle status means the request has never gone anywhere or been seen by any potential lenders. The request is stuck in limbo until staff process it further.

AutoMediated:AuthManual authorization means that VDX auto-mediated the request and created the Rota but request format or user category permission rules require staff to manually authorize request into the system.

VDX applies the **AutoMediated:AuthManual** authorization under two circumstances:

- Request is for a non-print format. VDX assumes that staff may need to adjust the request Rota before request is manually “Authorized” into the system.

OR

- If library has implemented Patron Initiated Interlibrary loan the request may have been issued by one of their patrons with “Manual Authorized Patron” user category assignment in their VDX user record. The self-issued requests of a patron with that user category will queue under “Idle” until staff review and manually authorize them into the system.

How to authorize Idle request into the system:

1. Select “Request” from list of available actions on the Idle request to open it in edit mode. It can now be modified and authorized. The request Authorization Status will be defaulted to “Authorized”.
2. If you do not need to alter the request, use Request button to submit the request. The request will engage with the first location on the Rota and you are done.

Request Details

Authorisation Status	Authorised
Item Format	Video DVD
Our Number	11457714

Make sure **Authorized** before submitting.

Some requests could be altered BEFORE authorizing:

Request format permission rules configured in VDX stipulate that non-print format (DVD, book on CD, etc.) requests should queue in Idle category to provide staff an opportunity to review the request before it is authorized into the system.

Not all libraries are willing to lend non-print format through interlibrary loan. If non lending locations were collected for the Rota of a non-print request the borrowing staff can remove the location from the Rota before request is authorized into the system.

1. Advance to “Rota Details” section of the request form.
2. Use the [Up](#) and [Down](#) arrows to change sequence order of locations in the Rota.
3. Use the [Remove](#) arrow to delete locations listed in the “Selected” column that you do not want the request sent to (locations whose policy is not to lend format/media type)

Rota Details

Holdings **Found**

Available

Selected

Prince Edward (County of) - Wellington - Main
Quinte West - Trenton - Main
Port Hope - Main
Ottawa - Main
Wellington County - Centre Wellington - Main
Brampton - Main
Chatham-Kent - Main
Windsor - Main

Up
Down

Add
Remove

Select and change order or remove unwanted locations before submitting request.

Select All Deselect All

Library symbol or location name: Search



Tip: Consult the **Media Loan List** in the “Interlibrary Loan” section on OLS website

- Libraries submitted their willingness to lend various non-print formats through ILL.
- Click column label to sort list. i.e. Select **DVD** in the header label and list will sort alphabetically by libraries willing to lend DVD.
- Print an alphabetical list sorted by the different media types you request.
- Consult the appropriate list to delete locations in the Rota of an AutoMediated:AuthManual non-print request if the location does not lend that format.

By doing this, the request will only go to locations that are willing lenders of that format.

There is no negative consequence if you do not remove non-lenders of a format from the Rota, other than it may take request longer to move through a request Rota as the non-lending locations respond “Answer Non supply”.

*See Chapter 12 Beyond Basic Borrowing – Requesting Non print (DVD, CD etc.) for suggestions on requesting Non print format items efficiently.

Media Interloan List

Legend:

Vid = Videos

BT = Books On Tape

TB = Talking Books

BCD = Books on CD

MCD = Music CDs

Nws Mic = Newspapers on Microfilm



Submit changes to this list for your library using our [INFO Media Interloan List Update Form](#).

Click column label to sort.

Library	Vid	DVD	BT	TB	BCD	MCD	Nws Mic	Comments
Ajax (OAJ)	Yes	Yes	Yes	Yes	Yes	Yes	No	We only loan DVDs to libraries on SOLS courier. We do not lend material that is in high demand within our system.
Asphodel-Norwood Twp. (ONO)	No	Yes	No	Yes	Yes	No	No	We only lend items 1 year or older to our collection, and we do not lend items that are very popular. We do not own Books on tape, VHS videos, music CDs or newspapers on microfilm.
Belleville (OBE)	No	Yes	No	No	Yes	Yes	No	
Black River-Matheson (OMAT)	No	Yes	No	No	Yes	No	No	

Example of Media Loan List sorted by DVD = Yes

End-of-Rota Requests - revive or complete

Requests that have moved through all Rota locations without being supplied queue in **End of Rota** category on Borrower Work Queue and require further mediation by staff.



Advise: Stay on top of End-of-Rota requests. If the request should not be pursued further, use the Complete action to clear it from the Work Queue. However, it does not have to be game over. You may be able to find more locations or reserve from a location that earlier indicated their copy was “Non-Supply - in Use”.

- Select [Details](#) link and examine request ‘History’ to see what responses you got.

Could you retry any previously used locations?

Non-Supply – Lost	Not an option for retry
Non-Supply - In Use	Viable - could retry if it was a while ago
Suspended	Viable - could retry when suspension is over
Expired-Indication	Viable - location let request expire, could retry now

- Further processing options have been referred to as “**the 4 R’s**” **decision tree**
 1. **RETRY** - retry previously used locations
 2. **RESERVE** - reserve from a single previously used location
 3. **RE-SEARCH** - bib search for a different edition with different ISBN
 4. **REGRETS** - notify patron you can’t get the item and then complete it in VDX

1. RETRY previously used locations:

- (a) Check the date - don’t retry too soon. If the location responded “Non Supply in use on loan” just a few days ago, you may have to wait awhile.
- (b) When timing is right, select “Request” from list of available actions.
- (c) Advance to “Rota Details” section of request form.
- (d) Use “**Library symbol or location name**” prompt to search for location(s) you are going to retry. Note: Previously used locations will be *grey ghosted* in the ‘Selected’ column locations and need to be added again.

The screenshot shows the 'Rota Details' section of a request form. It features two columns: 'Available' and 'Selected'. The 'Available' column lists 'Bruce County - Main' and 'Bruce County Museum and Archives, Library'. The 'Selected' column lists 'Milton - Main', 'Richmond Hill - Main', and 'Bruce County - Main'. Below the columns are 'Add' and 'Remove' buttons. At the bottom, there is a search prompt 'Library symbol or location name:' with a text input field containing 'Bruce County' and a 'Search' button.

- (e) Select desired location(s) from 'Available' and use **Add** arrow to move to 'Selected' for Rota column. Use **Up** and **Down** arrows to manually re-order the Rota.
- (f) Leave Authorization status set to "Authorized". Select "Request" button to send the request to the first location in your new Rota.

2. RESERVE from a single location:

- (a) Select "Request" from list of available actions.
- (b) Advance to "Rota Details" section of request form.
- (c) Use "Library symbol or location name" prompt to search for the single location you are going to request a reserve from. Note: Previously used locations will be *grey ghosted* in the 'Selected' column locations and need to be added again.
- (d) Type a "please reserve" statement in requests "Item Note" section.

Item Note



Tip: For added visibility you can type your reserve statement at the end of the title field as well, just in case the library you are sending the request to has a habit of working from screen and overlooks your Item Note.

Title

- (e) Leave Authorization status set to "Authorized" and submit request. Request will update to Pending status with the location you manually entered for the Rota.

3. RE-SEARCH the title for new locations:

Could there be a different imprint - publisher, edition with different ISBN that will generate a request with different locations.

- (a) Search catalogues again. If you find something suitable, issue a new request (it will have new request number).
- (b) Use 'Complete' action on the "End of Rota - Not Supplied" request to clear it from the Work Queue if you have created a new replacement request.

Perhaps you are going to forward the request to your OLS office for mediation to locations outside of the INFO network:

- (a) Select "Request" from list of available actions.
- (b) Enter additional details in **Item Notes** section to assist OLS staff handling your request.

e.g. Toronto non circulating. No other INFO locations found.
Can you check for other Canadian locations. Patron will pay charges up to \$15

- (c) Advance to “Rota Details” section of request form.
- (d) Type location name or code for your designated OLS office (OHESC or OSUN) in “Library symbol or location name” prompt.

Note: Southern libraries use: **OHESC**
Northern libraries use: **OSUN**

- (e) Advance to “Additional Service Details” section and select **No Expiry** for Expiry type. This over-rides 4 day expiry and allows OLS staff more time to work on your request.

Additional Service Details

Service Level	Normal - Local Search
Can Hold	<input type="text"/>
Need By Date	02 May 2014 <input type="text"/>
Expiry Type	No Expiry <input type="text"/>
Expiry Days	4 <input type="text"/>

- (f) Leave Authorization status set to “Authorized” and submit request. Request will update to Pending status with the location you manually entered for the Rota.

4. REGRETS sent to patron because unable to pursue further:

If you can't retry, reserve or re-search you may find yourself at the regrets stage where you notify patron that the item will not be supplied.

- (a) Send the patron an on-the-spot email with the “Send User Alert” action, which is used to communicate with the patron by email directly from the request.



Tip: See procedures for using “Send User Alert” action in Chapter 11.

- (b) If email address not available, you might print the request as a reminder to telephone patron to inform them the item will not be supplied.
- (c) Use the “Complete” action on the Not Supplied request that is queued under “End of Rota” to clear it from the work queue. It is no longer required as you have notified the patron that they will not be receiving the item.



Note: Remember the request will disappear from regular search query display after it is ‘Complete’. If there is a future inquiry the request can be found with an Advanced Request search that has “Include Completed Requests” selected.



Tip: If you are undecided on your next step because you need to consult the patron or collect other information, leave the request “parked” in the “End of Rota” Work Queue until you are ready to act on it. Add a “Private Note” to record decisions or guide your next steps. Text entered into the “Private Note” section is only seen by your staff.

Complete action - when to use

When is it “safe” for staff to use the **Complete** action on a request that you are finished with and no longer need it in your active Work Queue?

The rule of thumb:

- Do not **Complete** a request that is in an active ‘engaged’ state with another location. A request that is ‘Pending’ with a responder location should never be completed until a Request to Cancel has been acknowledged by the responder. Requests should only be completed if you are sure no further action will be taken on them.
- You can safely complete any request that is “all about you” and no other location is actively involved with the request. Use the Complete action on requests that are **Idle** or **Not Supplied** as they are not active with a potential responder.

Procedure:

- (a) Select “Complete” from list of available actions.
- (b) Add ‘Private Note’ to record the reason for complete (in case there is future inquiry). Private Note is not seen by anyone other than local staff view of a request so it is useful for recording actions taken or intended next steps.

i.e. Completed to clear Not Supplied from WQ – replacement request issued. /JP
- (c) Select “Complete” button to submit.



Note: Completed requests are not retrievable with regular search query. If there is a future inquiry the request can be found with an Advanced Request search that has “Include Completed Requests” selected.



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

Certain VDX actions have been configured to “auto-complete” requests. They are:

<u>Action</u>	<u>Performed by:</u>	<u>Auto-Completes for:</u>
Answer Non-Supply	Responder	Responder only
Cancel Reply-Yes	Responder	Responder only
Checked-In	Responder when item is returned to them	both Requester and Responder
Received	Requester on a Copy-Non Returnable	both Requester and Responder