Chapter 12: Beyond basic Borrowing (internally)

Journal Article – copy non-returnable requests

You may request full printed journal or photocopy of articles on VDX.

1. Do a search to locate serial title.   e.g. Newsweek

2. Select **Service Details** as appropriate. *See **Appendix 3: Service options further explained**

```
▼ Request Details
                Authorisation Status   To be Authorised        ▼
                      Item Format   Print Journal        ▼

▼ Service Details
                          Requested Service Type 1
              Service Type   Copy non returnable   ▼
               Media Type   Photocopy              ▼
                 Copyright   CANCOPY
          Copyright Signed   Not Applicable        ▼
```

3. Complete "Volume/Issue" and "Article Details" section of the request form.

```
▼ Item Details (Journal Article)

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

         Our Local Number
            Journal Title   Newsweek
                Subtitle
               Publisher   Newsweek, Inc., etc.]
                   ISSN   0028-9604
          Volume / Issue   vol 134: no 17 (25 Oct 1999)
               Part Date
               Classmark

  Article Details
                  Title   The Siberian Conspiracy
                 Author   Jones, Jack
                  Pages   29-32, and 64

          Additional Nos   LCN: 35009615 //r43
             Ref. Source   Ontario Library Consortium/OLCO
```

4. Select desired Delivery Method.

Note: If requesting "Electronic Mail" or "Facsimile (fax)" it is helpful to the supplier if you include your email address and/or fax number in **Item Notes** so lending library does not have to look it up.

5. Select appropriate "Authorization Status" and submit the request.

Tip: If you cannot locate a serial title, follow directions for completing a blank request form. This request can be sent to your designated Ontario Library Service office (either OHESC or OSUN) for further verification and sourcing.

Create Request - Blank Form

The blank Create Request form can be completed and submitted to selected locations when a suitable bibliographic record is not located within VDX.

1. Select **Create** link at top of Request screen.

2. Select the appropriate **Item Format** from the drop-down list. The bibliographic fields provided are dependent on the item format chosen.

3. Complete blank form with as much bibliographic data as possible. It is mandatory to enter a title.

4. Try to elaborate in **Item Notes** section if it will help to verify your request. For example:

   - Verified on Amazon, but no locations on VDX
   - Patron saw author interviewed on Marilyn Dennis show last week
   - Found an eBook but unable to find a Canadian location for a hard copy

5. Create the **Rota** manually.

   - you may be sending the request directly to a supplier you know has the item but you cannot locate it in a search within VDX.

     i.e. Microfilm request to Archives of Ontario (OTAR)

   - you may be sending the request to your designated OLS Office for further verification and sourcing.

     o Southern libraries send to   **OHESC**
     o Northern libraries send to   **OSUN**

| Item Note | Verified on Amazon, but no locations on VDX. OHESC: Is there any Canadian non charging location for this title. |

▼ Rota Details

Holdings   **Found**

Available

Southern Ontario Library Service

➡ Add
⬅ Remove

Select All   Deselect All

Library symbol or location name: OHESC   **Search**

Selected

Southern Ontario Library Service

⬆ Up
⬇ Down

4. Select **Additional Service Details** to modify service information as appropriate for a special request being passed to agency staff for mediation that will need more than 4 working days to process your request.

    - Service Level should be: **Normal – Extended Search**
    - Expiry Type should be: **No Expiry**

Note: Requests sent to your designated OLS office for further mediation should always have the Expiry Type set to **"No Expiry"** (to override the default 4 day Calc from Expiry Days setting) Regular settings would only give the OLS office ILL Unit staff 4 days to work on your request before it expires and bumps back to you as an 'End of Rota" Not Supplied item.

Additional Service Details	
Service Level	Normal - Extended Search
Can Hold	
Need By Date	14 Aug 2014
Expiry Type	No Expiry
Expiry Days	

Example of request being sent to OLS ILL Unit mediation staff with Expiry Type set as 'No Expiry'

5. Finally, make sure the Authorization Status is set to **Authorized** and submit the request.

Creating custom search profiles

A search profile is a collection of searchable catalogues. Profiles followed by [shared] were created for your VDX system administrator and are globally available to all users. They cannot be changed except by system administration.

A library can create their own custom profiles.

1. To create a new profile or edit or delete a previously created profile, select **Profiles** from the top menu.

   Standard | Advanced | Profiles | Results | Merge Duplicates | Filter Options | Sort Results

2. The Search Profile Manager screen will display.

   Edit Create Delete

   My Search Profiles

   Books on CD
   DVD Search
   German Language Search

   Any custom search profiles previously created will display under My Search Profiles.

3. Select **Create**. Give your profile a Name. Enter the details of the Search Profile in the Description field.

   Create Profile

   Name: DVD Lenders A-F

   Description: DVD lending libraries from A-F on Media Loan List April 2016

4. Select the collection or collections to be included in your custom Search Profile by clicking on the check boxes beside the catalogue name.

   ☐ Champlain Township Public Library
   ☐ Chatham-Kent Public Library
   ☐ Clarence-Rockland Public Library
   ☐ Clarington Public Library
   ☐ Cobourg Public Library
   ☐ Cornwall Public Library
   ☐ Cramahe Township Public Library
   ☐ Deep River Public Library

5. Once you have selected your preferred list of collections, click the **Create** button to save your profile. The new profile will be accessible from Current Profiles drop-down in both the Standard and Advanced Search.

IMPORTANT: Be mindful of creating custom profiles that have too many catalogues. Very long profile lists are discouraged in VDX as it adversely affects search response time for the user submitting the search (and potentially all users logged into the network if a large number of catalogues were searched simultaneously).

Tip: Consider splitting what would be a long profile in two to reduce the number of catalogues in each one.   Instead of DVD Lenders (with all of them listed) create DVD Lenders A-F and DVD Lenders G-Z.

Tip: Consult the **Media Loan List** in the "Interlibrary Loan" section on OLS website.

- Libraries submit 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.
- Use the list to know which libraries to include in a custom search profile.

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

Requesting Non print items (DVD, CD etc.)

Users can select any search profile to look for non-print items. Some users have created custom search profiles for themselves containing the catalogues of libraries that are willing to lend a particular format on interlibrary loan.

*Consult the **Media Loan List** in the "Interlibrary Loan" section on OLS website.

Example: Looking for DVD of: **Bullies are a pain in the brain**

1. Select your custom DVD Lenders profile for the search (if you created one).

2. Perform Advanced search by title: **Bullies are a pain in the brain   24 results**

3. **Filter** results by format = **DVD**   **2 results**

4. Merge duplicates might combine the DVD results into fewer records with combined holdings if the ISBN is the same.   In this example, that was not the case.

5. Use **Request** on a search result. Set "Authorization Status" to "Authorized" because you want to direct request to a Rota you will manually create of DVD lender locations.

6. Advance to "Rota Details" section of request form.

    (a) Select location(s) in "Available" column and use Add arrow to move them to "Selected" for Rota column.

    (b) Use "Library symbol or location name" prompt to add other locations you are aware of to the "Selected" for Rota column.

    Important: Be sure you are using the "Main" centralized ILL location and not a branch. If the location displayed is a branch, then manually enter the main location.

7. Add a Private staff note for future reference if useful for future processing.
    i.e. "Only 2 locations for this DVD"

8. Submit the request.

Book Clubs - requesting multiple copies of a title

Book Club Sets is an easy way to go

Consider getting a whole book club set from a library willing to lend them on interlibrary loan **as long as weight does not exceed 5kg.** Boxed kits typically cannot be delivered by Canada Post library material rate as they exceed 5 kg weight maximum. Libraries may choose to make alternative arrangements with each other for shipments using their delivery method of choice.

Browse the links on 'Libraries with Book Club Sets' list on the OLS website

1. Check the owning library's online catalogue availability indicator or do a search in VDX against that library and check the availability column displayed in VDX.

2. Then "Authorize" a VDX request to that specific location for the whole set. Be sure it is clear in the title field that it is the "set" that you want.

| Title | The lost symbol [book club in a bag] |
| Subtitle | a novel |

VDX search technique to find Book Club sets

When searching for a book club title, add **club*** to a keyword search to collect results that are book club kits, book club sets, or book club in a bag. The common word is "club". Some libraries use club(s) plural. To collect both enter **club***.

Example: **The illegal** by Lawrence Hill (as a book club set/kit/bag)

| Current Profile: | SOLS Niagara Peninsula [shared] |
| Search for: | illegal hill club* |

This search resulted in 5 hits:
1 single title result and 4 results from libraries with a bib record for book club set/kit/bag.

1. Check the availability indicator in the bib record details for each result.   In the example above, one library was non-circulating, another was checked out. The remaining were "available" or "on shelf".

2. Use the Request link on one of the available search results.

3. In Rota Details section, select the location in "Available" and use ➡ Add it move it to "Selected" column.

   Important: Be sure you are using the "main" centralized ILL location and not a branch. If the location displayed is a branch, then manually enter the main location.

4. Set request Authorization Status to "Authorized" before submitting the request.

Done! With one VDX request!
A big "Thank you" to libraries that lend full book club kits!

One-copy-at-a-time approach

If you have no luck finding a whole book club kit you will need to create multiple individual requests to get the number of copies that you need.

First, let's be clear on what NOT to do

- If you need 8 copies do not create 8 identical requests using the same bib record result for each one with the authorization status left as "To be Authorized". If you do, VDX will build the identical Rota for all 8 requests.

- The first lender will get all 8 requests for the same title at the same time. They might ship one copy and will have to respond "Answer Non Supply" to the remaining 7 on their picklist. This will cause 7 requests to go to the next Rota location and that library will have to deal with 7 requests for the same title.

Conceptually what should be done?

- Issue separate requests with 2 (or 3 or 4) locations in the Rota. The goal is to "spread it around" instead of using the identical Rota for all copies needed.

- Set request Authorization Status to "Authorized" before submitting the request. Changing the status to 'Authorized' bypasses the normal VDX Rota building process. The request will only go to the locations you have manually selected for the Rota.

- If it is not critical for the book club, use different editions (hardcopy, paperback) of the title to create requests. Different editions will have different ISBN's and will collect different locations to request from.

Use some of VDX's features to assist creating multiple requests

1. Select a search profile and search for desired title.

2. Use **Merge Duplicates** on search result set.

3. Select **Save** icon on a search result with duplicates to save to the **Saved List**.

4. If one saved merged request will not give you enough locations to use 2 or 3 locations in the Rota per request, then

    a) repeat the search against a different search profile to collect hits from libraries in another geographic area

    b) merge duplicates and **Save** another request to the **Saved List.**

    c) repeat against yet another geographic area search profile if you feel you will need more locations to spread your requests over.

5. Select **Saved List** at the top of search screen to request the item.

My Saved List

Display format: Default ▾

Bring selected items to top
Select all items   ⊗ Remove 🏠 Email ➡ Request 🖨 Print
Deselect all items

☐ 1. **Sea glass : a novel / Anita Shreve. --**
   Boston : Little, Brown, 2003, c2002.
   Number of holdings: 1
   Collection: Ajax Public Library

☐ 2. **Sea glass : a novel / Anita Shreve.**
   Boston : Little, Brown, ©2002.
   Number of holdings: 1
   Collection: INFO (WorldCat)

6. Tick box beside the first item on 'My Saved List' and use **Request** link.

    a) In Rota Details section on the request form, select 2 (or 3-4 if you have lots to play with)
        locations from "Available" and use ➡ **Add** to move them to "Selected" column.

        Important: Be sure you are using the "Main" centralized ILL location and not a branch.
        If the location displayed is a branch, then manually enter the main location.

    b) Select "Authorized" as Authorization Status before submitting request to those locations.

7. Go back to **Saved List** to create another request.

    a) Select different locations from "Available" to move to "Selected" column than ones you used
        on previous request(s).

    b) Use the first saved request until you run out of locations and then switch to the second
        saved request if you still need to issue more requests.

And so on….
**Repeat as often as necessary until you have issued the number of requests needed for
your book club.**