



# **Procedures Manual and Training Resources**

Last updated: July 4, 2019 by Samantha West, Client Services Librarian

# Basic WorkFlows Procedures

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## Accessing / Logging into WorkFlows

1. You can open WorkFlows by double-clicking the WorkFlows icon on the desktop.
2. When you open WorkFlows, the first thing you will see is the “Configuration” box with host and workstation information. Click OK when this box pops up. The Login box will appear next, the User ID and PIN for your Library are as follows:
  - o User ID: \_\_\_\_\_
  - o PIN: CIRC
3. WorkFlows will now open.
4. When it appears on the screen, ensure that **Public Circ** is selected in the top left-hand menu bar.



## Registering a New Patron

1. From the left-hand menu, open the **Users** wizard group and click **User Registration**.



2. The **User Registration** box will appear

- a. Select the appropriate Profile Name
  - i. **SG\_\_\_\_\_ – General Membership**
- b. Scan the patron's barcode.

3. The "User Registration" screen will now appear. There are several tabs

and you need to click on several in order to record the patron's information:

- a. **Basic Info Tab:**
  - i. Record the patron's first name & last name. Double check that the Library is set to SG\_\_\_\_\_ and update if it is not.

Double check that the Profile name is the same one that you selected earlier.

Figure 2: Basic Info Tab / User Registration Screen

**b. Privilege Tab:**

- i. Make sure the expiration date is correct.

If you need to change the expiration date, click the diamond shaped 'gadget' button next to the date and select a new one from the calendar that pops up. If you change the date, you will need to enter the override password in the override box (password is SPRING)

- ii. A PIN will be automatically generated.

Ask the user if they wish to change the PIN to something else – if so, then enter the new PIN into the box. The user will need the PIN number to log into his/her library account and to access eBooks and other electronic resources.

**c. Demographics Tab:**

- i. **User cat1:** Select the patron's city or region from the dropdown box. i.e. GEM

- ii. **User cat2:** Select patron's demographic from the list i.e. CHILD, ADULT, SENIOR, etc.

- iii. **User cat3:** Select patron's gender from the list

- iv. **Birth date:** Click the diamond gadget button and select the user's birth date from the calendar that appears. Click OK when you are finished.



Figure 3: Birth Date Selector

**d. Address Tab:**

There are 3 Address fields, but Shortgrass only uses **Address 1**.

- i. Fill in **STREET, CITPROV, POSTALCODE**, fields.

Also fill in **PHONE** and **EMAIL** fields if information is available.  
See example of how this will look below:

Figure 4 A  
Complete  
Address  
Entry

Address 1	
STREET	78 SOUTH RAILWAY AVE
ADDR_NOTE	
CITYPROV	IRVINE, AB
POSTALCODE	T0J 1V0
CARE/OF	
PHONE	403-123-4567
WORKPHONE	
CELL	
EMAIL	ronald007@gmail.com

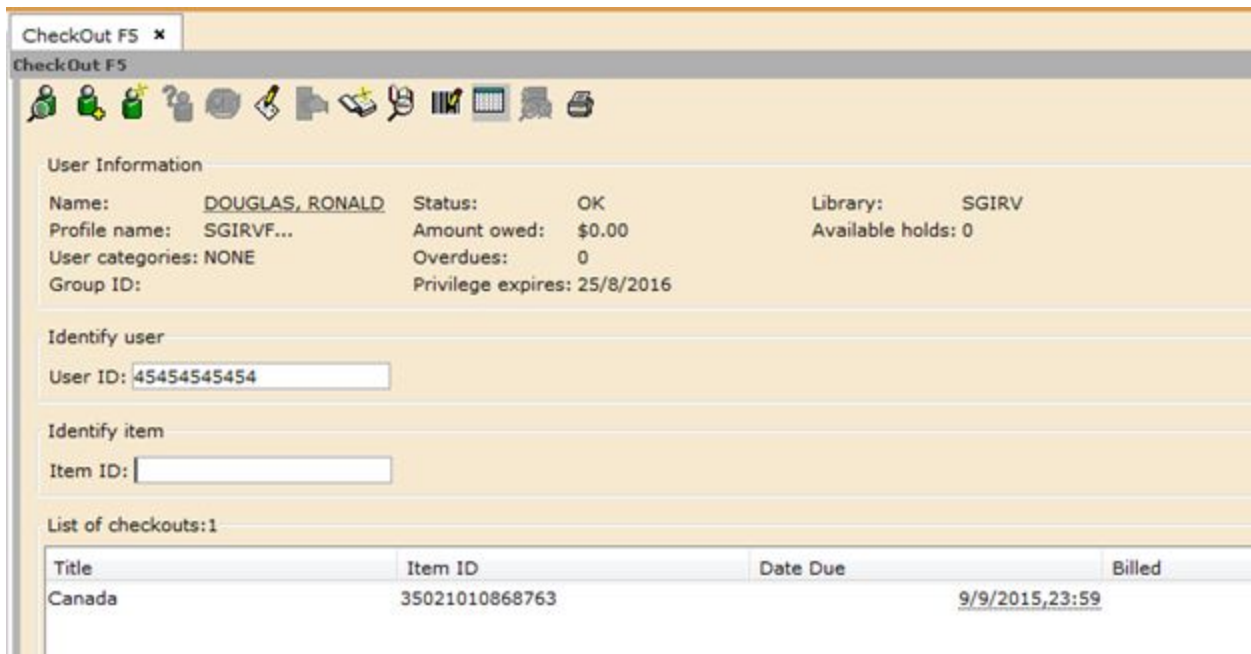
**e. Extended Info tab:**

- i. NOTE: This is an optional field that your library can use. Anything you enter into a note field will appear on the checkout screen later. For example, if a patron left her card at the library, you could record a note that says “Patron left card on shelf. Put it in staff room filing cabinet with her name on it / Aug 14, 2015”.
- ii. NOTIFY\_VIA: You must enter one of the following three notification options:
  - 1. PAPER: Patron will not be notified when holds arrive
  - 2. EMAIL: Patron will receive an email when holds arrive

4. When you are finished entering the patron’s information, click the “Check Duplicate User” button at the bottom of the screen. The system will look to see if this patron already exists in the database. If the patron already exists, that information will appear on the screen. If there are not duplicate users, you can then click the Save button at the bottom of the screen to register the patron.

## How to Check Out an Item

1. Under the “Common Tasks” wizard group, click “CheckOut F5”
2. Scan or type in the patron’s barcode number under the User ID field
3. Scan or type in the item barcode number under the Item ID field
4. Checkout details will appear at the bottom of the screen and will show a list of titles, Item ID numbers, and due dates



The screenshot shows a software window titled "CheckOut F5". At the top, there is a toolbar with various icons. Below the toolbar, the "User Information" section displays the following details:

Name:	DOUGLAS, RONALD	Status:	OK	Library:	SGIRV
Profile name:	SGIRVF...	Amount owed:	\$0.00	Available holds:	0
User categories:	NONE	Overdues:	0		
Group ID:		Privilege expires:	25/8/2016		

Below this, the "Identify user" section has a "User ID:" field containing the value "454545454". The "Identify item" section has an "Item ID:" field which is currently empty.

At the bottom, the "List of checkouts:1" section contains a table with the following data:

Title	Item ID	Date Due	Billed
Canada	35021010868763		9/9/2015,23:59

Figure 5: The Checkout Screen with Completed Checkout Listed at the Bottom

## How to Check In an Item

1. Under the “Common Tasks” wizard group, click “CKI / Discharge F3”
2. Scan the item barcode or type in the barcode number under the Item ID box
3. The item will be checked in. Any accrued fines will appear on the screen.
  - a. If it is an Irvine item and there are no holds on it, nothing further will happen.

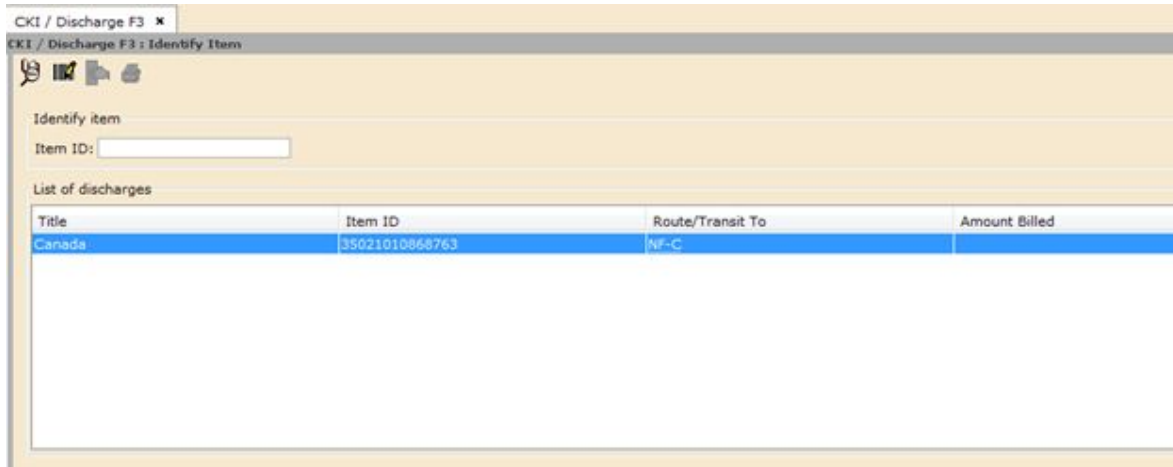


Figure 6: An Irvine Item that was checked in. There are no holds on it, so no further action is required.

- b. If the item belongs to another library, or if someone at another library has a hold on the item then it will be placed “In Transit” to that library, and you must mark it for the Shortgrass driver to pick up on the next delivery date.

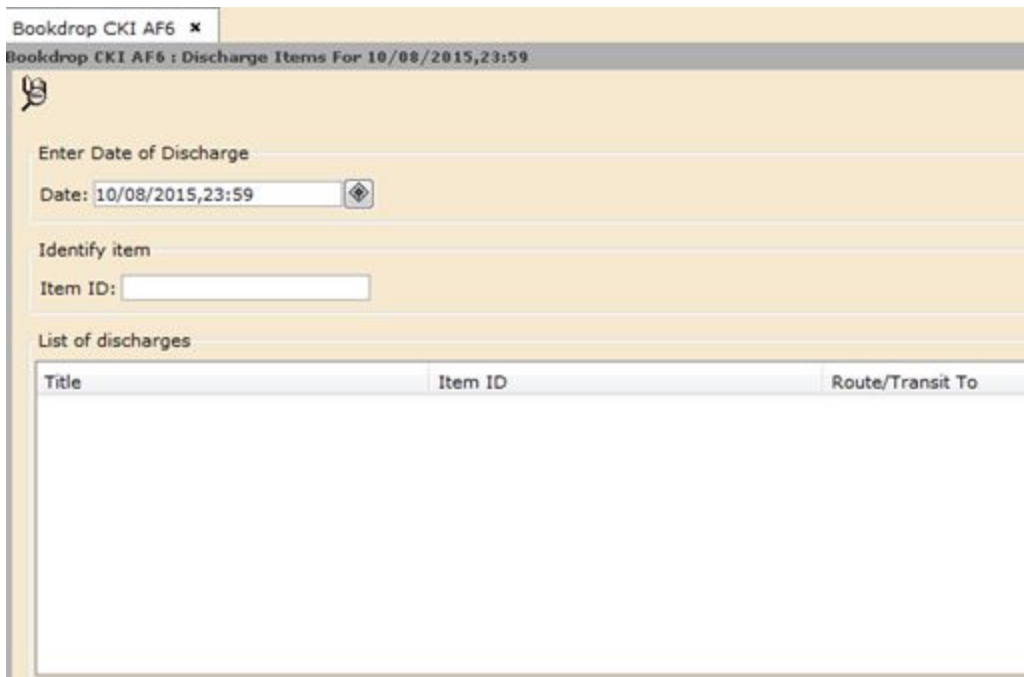
Figure 7: This Item was Checked In and Needs to Go to Another Library - Shortgrass HQ in this Case.





## How to Check In Book Drop Items (Backdated Check-Ins)

1. Under the “Common Tasks” wizard group, click “Bookdrop CKI AF6”
2. Under “Enter Date of Discharge”, click the diamond gadget button and select a check-in date from the list.
3. Scan the item barcode or type the barcode number under the Item ID field to check in the item



The screenshot shows a software interface for 'Bookdrop CKI AF6'. The window title is 'Bookdrop CKI AF6' and the subtitle is 'Bookdrop CKI AF6 : Discharge Items For 10/08/2015,23:59'. The interface is divided into three main sections:

- Enter Date of Discharge:** A date field is set to '10/08/2015,23:59' with a diamond-shaped gadget button to its right.
- Identify item:** An 'Item ID' field is present, currently empty.
- List of discharges:** A table with three columns: 'Title', 'Item ID', and 'Route/Transit To'. The table is currently empty.

Figure 8: The Bookdrop CKI Screen

## How to Renew a Checked-Out Item

1. Under the “Common Tasks” wizard group, click “Renew by User F7”
2. Scan the user’s barcode or enter the number. You can also search for the patron by name via the User Search icon in the top-left corner:



- a. You can search for the user by name, email, or various other fields. Once you locate the user in the list, highlight his name and click “Renew Items for User” at the bottom.

The screenshot shows a dialog box titled "Renew by User F7 : User Search". It contains search fields for Name (DOUGLAS), a search button, and options for Index (Name), Library (SGIRV), and Current (454545454). There are also radio buttons for search Type: Keyword, Browse (selected), and Browse user group. Below is a table of users with "DOUGLAS, RONALD" highlighted.

Name	User ID	Alt ID	Phone
DISCARD USER @...	SGIRVDISC		
<b>DOUGLAS, RONALD</b>	<b>454545454</b>		
Irvine Community ...	SGIRV		
SGIRV Circulation	ZCSGIRV		
SGIRV ILL user	SGIRV-ILL		
SGIRV Public user	SGIRVPUB		
SGIRV Technical S...	ZTSGIRV		
SGIRV WWW user	SGIRVWEB		
SHORTGRASS, IR...	25021000721040		
SLS TEST PATRON...	IRVINE_TEST		

Buttons at the bottom: Renew Items for User (b), Display this User Group, Return to User Group List, Cancel.

3. Under the “Renew” column, check the box next to the item(s) you wish to renew. Then click the Renew Selected Items button at the bottom. If the item can be renewed, then the new due date will appear on the screen.

## How to Pay a Bill on a Patron's Account

1. Under the "Common Tasks" wizard group, click "Paying Bills"
2. Scan the user's barcode or enter the number. Alternatively, search for the user via the User Search function (explained on page 7).
3. A list of the user's bills will appear on the screen. You can make a lump sum payment by entering an amount and payment type under "Total bills and payments" or you can pay a specific bill by entering an amount and payment type on a particular line item under "Individual Bills and Payments". Once this is entered, click the Pay Bills button at the bottom to pay the bill.
  - a. Most libraries just use the CASH payment type, unless the fine is being waived. In those cases, select Waived-Del from the list

The screenshot shows the 'Paying Bills AFS' interface. It is divided into several sections:

- User Information:** Name: DOUGLAS, RONALD; Status: DELINQUENT; Library: SGIRV; Profile name: SGIRVF...; Amount owed: \$2.00; Available holds: 0; User categories: NONE; Overdues: 0; Group ID: (empty).
- Identify User:** User ID: 454545454 (in a text box).
- Total bills and payments:** Total bills: 1; Total owed: \$2.00; Still owes: \$2.00; Credit balance: none; Payment type: CASH (in a dropdown menu).
- Individual Bills and Payments:** A table with columns: Title, Item ID, Reason, Owes, Payment Type, Pay.

Title	Item ID	Reason	Owes	Payment Type	Pay
		BEHAVIOUR	\$2.00	CASH	

Figure 10: The Paying Bills Screen

### How to Renew a Patron's Privilege

1. Under the "Users" wizard group, click "Renew Privilege"
2. Scan the user's barcode, enter the number, or search for the user via the User Search feature (explained on page 7)
3. Click the extend privilege button at the bottom to renew the membership for 1-year from today's date. A confirmation box will pop up and display the new expiry date.

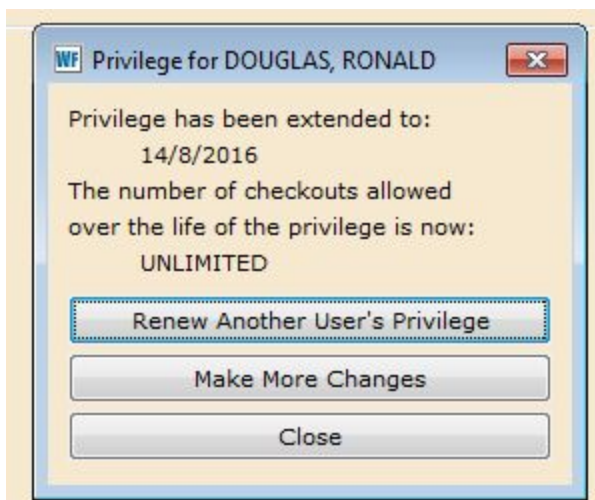


Figure 11: Renewal Confirmation Box


## How to Change a Patron's Address or Other Information

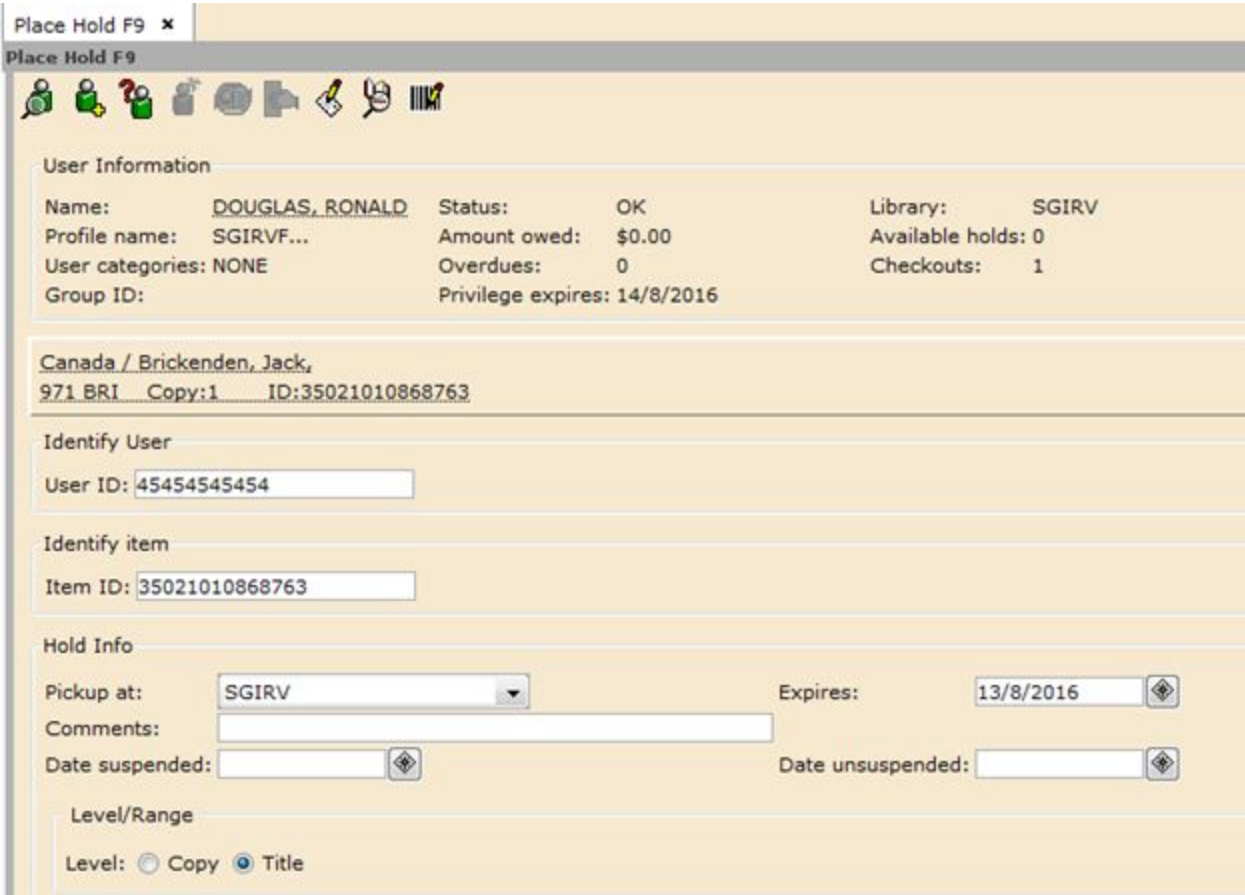
1. Under the "Users" wizard group, click "Modify User"
2. Scan the user's barcode, enter the number, or search for the user via the User Search feature (explained on page 7)
3. You will be brought to a screen that is very similar the user registration screen. Change information as required and click the Save button at the bottom when you are done.

The screenshot displays the 'Modify User' interface. At the top, it shows the user's current information: Name: DOUGLAS, RONALD; Id: 45454545454; Group ID; and Profile name: SGIRVF... Below this is a section titled 'Identify User' with a text input field containing 'User ID: 45454545454'. A horizontal tab bar below the identification section includes 'Basic Info', 'Privilege', 'Demographics', 'Addresses', 'Extended Info', and 'User groups'. The 'Basic Info' tab is active, showing various form fields: Title (empty), First name (RONALD), Preferred name (empty), Middle name (empty), Last name (DOUGLAS), Suffix (empty), User ID (45454545454), Alt ID (empty), Group ID (empty), Library (SGIRV), Profile name (SGIRVF), and Charge history rule (CIRCRULE). There are two checkboxes: 'Use preferred name' and 'Allow routing', both of which are currently unchecked.

Figure 12: Modify User Screen

## How to Place a Hold on an Item

1. Under the “Holds” wizard group, click “Place Hold F9”
2. Under Identify User, scan the user’s barcode, enter the number, or search for the user via the User Search feature (explained on page 7)
3. Under Identify Item, scan the item barcode if you have it or click the Item Search icon at the top to find the item: 
4. Click the “Place Hold” button at the bottom of the screen



The screenshot shows the 'Place Hold F9' application window. It features a toolbar with various icons at the top. The main content area is divided into several sections:

- User Information:** A table-like display showing user details.

Name:	DOUGLAS, RONALD	Status:	OK	Library:	SGIRV
Profile name:	SGIRVF...	Amount owed:	\$0.00	Available holds:	0
User categories:	NONE	Overdues:	0	Checkouts:	1
Group ID:		Privilege expires:	14/8/2016		
- Item Information:** A section showing the item's location and ID.

Canada / Brickenden, Jack,  
971 BRI Copy:1 ID:35021010868763
- Identify User:** A text input field for the User ID, containing '45454545454'.
- Identify item:** A text input field for the Item ID, containing '35021010868763'.
- Hold Info:** A section with several fields:
  - Pickup at: A dropdown menu showing 'SGIRV'.
  - Expires: A date field showing '13/8/2016'.
  - Comments: A large text input field.
  - Date suspended: A date field.
  - Date unsuspended: A date field.
- Level/Range:** A section with radio buttons for 'Level', 'Copy', and 'Title'. The 'Title' option is selected.

Figure 13: Place Hold Screen

## Daily Hold Pickup Lists

1. The "List Onshelf Items with Holds" report runs twice daily (7:15 am and 4:00 pm) and will be delivered via email to the account you have designated for this. You must retrieve the items appearing on the list from your shelves and check-in each one which will switch the item status to "in-transit".

**\*In the event that an item cannot be sent, please email the requesting library.**

### Library Notice

Inbox x



Your Public Library <sirsi@sirsi-shortgrassp.chinook.chinookarch.ab.ca>

to \_\_\_\_\_

#### CLEAN HOLD SHELF LIST

Produced Wed Nov 23 05:30:15 2016

Library: \_\_\_\_\_

616.89145 HAR  
Harris, Thomas A. (Thomas Anthony), 1910-1995  
I'm OK-you're OK / Thomas A. Harris  
location:INTRANSIT item ID:35021008150877 item type:SGBK

BAN  
Shuman, Jason  
Bangkok dangerous [videorecording]  
location:INTRANSIT item ID:35021011523490 item type:SGDVD

KEL  
Kelly, Karen  
Boxed in / Karen Kelly  
location:INTRANSIT item ID:35021011102774 item type:SGBK

2. As you check-in each item, record the receiving library on a piece of paper or sticky note and attach to the item. This will ensure the item will find its way to the correct library.
3. Finally, place the item inside the red Shortgrass bin for driver pick up.

## How to Discard an Item

1. Under the “Common Tasks” wizard group, click “CheckOut F5”
2. In the User ID field, type in your UserID and DISC
3. Scan or type in the item barcode number under the Item ID field
4. Checkout details will appear at the bottom of the screen and will show a list of titles and Item ID numbers
5. The items will be removed once a month to complete the discarding process

User Information			
Name:	<u>DISCARD USER @ IRV</u>	Status:	OK
Profile name:	DISCARD...	Amount owed:	\$0.00
User categories:	NONE	Overdues:	0
Group ID:		Privilege expires:	NEVER

Identify user	
User ID:	<input type="text" value="SGIRVDISC"/>

Identify item	
Item ID:	<input type="text"/>



## Ordering From United Library Services (ULS)

# ULS Ordering Procedure: Member Library Staff

Revised: September 2015



# INTRODUCTION

## **What is 9xx ordering?**

9xx ordering allows library staff to select materials for ordering on <https://www.uls.com>

## **How does this apply to Library staff? What is the process?**

The selector (library staff) places items they wish to order into a shopping cart, chooses the holding codes and funds and when he/she is done shopping, clicks on the checkout button to transfer this information to Shortgrass Acquisitions staff.

## **What happens after the order has been placed?**

Shortgrass staff downloads the brief bibliographic records and holding information to Symphony WorkFlows by running a couple of reports. The funds and holding codes are then double checked and materials are ordered electronically from ULS. When the material arrives at Shortgrass, it is then received, catalogued, processed, and delivered via van delivery to your library.

## SEARCHING TECHNIQUES

*There are 2 ways to search items on the ULS website.*

- A) Browse selection lists created by ULS
- B) Search for specific item through the Quick Search or Advanced Search

### **A) Browse the Selection List**

1) If you want to browse the lists provided by ULS, click “Selection Lists” at the top of the screen.

2) In this example, we picked the “Alberta Social Studies” Selection List, chose the 3rd item, changed the quantity to 1, and using the drop down window, we selected the appropriate Sonata Template (fund and holding code i.e., SGMEDC-SGMEDNFBKC). Finally, we clicked “Add to Cart”.

3) ULS creates a default shopping cart for you called “My Cart”. If you wish, you can create a new cart with a custom name. To do this, click the dropdown next to “My Cart,” click “Create New Cart,” and then enter a name for your cart.

4) If you wish to order 2 copies with different funds and holding codes: first, using the drop down window, choose Sonata template (fund and holding code) for the first item, quantity and ADD to cart. Then, using the drop down window, click on the next Sonata template, quantity and ADD to cart.

## **B) Search for specific item**

- 1) Quick search or advanced search is located at the top of the screen. We can search by title, author, or ISBN. In this example, we type in “Alberta” and click “Search”.
- 2) On the Quick Search Results list, you can choose the item you want to purchase.
- 3) Click and choose the appropriate Sonata Template (fund and holding code) by using the drop down window, enter your quantity and click ADD to cart, like the example below.
- 4) If you wish to order 2 copies with different funds and holding codes: first, using the drop down window, choose Sonata template (fund and holding code) for the first item, quantity and ADD to cart. Then, using the drop down window, click on the next Sonata template, quantity and ADD to cart.

## **COMPLETING YOUR ORDER**

- 1) Once you have completed your order, click on View Carts in the top-right corner of the screen and then click on the cart name for the order that is ready to submit.
- 2) You will be brought to a new screen listing all of the items in your cart. Double-check the quantities and the Sonata templates to make sure they are correct. When you are ready to submit your order, click “Proceed to Checkout” in the bottom-right corner of the screen.

3) A page will appear that says “You cannot submit your order directly to ULS”. Select \*SLS Acquisitions\* from the dropdown menu and click the “Transfer Cart” button at the bottom to send your order to Shortgrass. You can use the comments box to send a special message to Shortgrass re: your order.

a. **\*\*MHPL staff\*\***: you must submit your order to your supervisor instead of \*SLS Acquisitions\*. Select your supervisor’s name from the dropdown menu and click “Transfer Cart” to do this.

## HOTLIST SELECTION LIST ORDERING FROM ULS

### 1. LOGIN TO THE ULS WEBSITE: (<https://www.uls.com>)

Use your email and password.

### 2. CREATE A CART ON ULS:

- a. Click **Manage Carts** (top right of screen).
- b. **Enter the cart name using your Library’s name + Hotlist** under Create a New Cart (left of the screen).
- c. **Click Add.** You will receive confirmation when it’s created.

### 3. ORDER FROM THE ULS SELECTION LIST(S):

There are 2 ways to do this.

- a. **Search the ISBN from the paper catalogue** using the Quick Search box.
- b. **Click Selection Lists** on the ULS website to view the selection lists.
  - i. **Click Hotlist First & Second Choice**
  - ii. The Hotlist Editions are listed across the top of the page with deadlines for submitting the order. **Make sure the most recent Hotlist Edition is selected.**

The name of the hotlist you are viewing will be indicated in bold green font (highlighted below).

1. Hotlist Editions are listed from left to right, most recent to least recent.
  2. To view different Hotlist Editions, click the blue selection list name.
- iii. **Switch between the Fiction, Nonfiction and Second Choice lists, by clicking the blue list name** listed below the Hotlist Editions.

When viewing the Fiction list, you will see the option to click the Non-Fiction list (Image 1) and when viewing the Non-Fiction list, you will see the option to view the Fiction list (Image 2).

Image 1:

Image 2:

- iv. Scroll through the list of selected titles, adding them to your cart.

#### 4. **ADDING ITEMS TO THE ULS CART:**

- a. **Scroll down and select your cart's name** (highlighted in the image below).

b. **Click the down arrow next to “Choose Sonata Template” and select the holding code.**

c. **Enter the quantity** (i.e. 1) and **Click Add To Cart.**

d. **A confirmation message will pop up**, indicating the item has been added to the cart.

e. The quantity & total cost will increase in the top right region of the screen as you add items to the cart.

f. **Note:** ULS usually remembers the Sonata template and cart you are adding to, after you enter it the first time.

## 5. **COMPLETING YOUR ORDER:**

a. **View your cart by clicking on your cart’s name** (top middle right of screen in green font)



- b. **Double check the quantities and Sonata templates are correct.**
  
- c. When you are ready to submit your order, **click Proceed to Checkout** (bottom right of the screen).
  
- d. A page will appear that says “You cannot submit your order directly to ULS.”
  
- e. **Select \*SLS Acquisitions\*** from the dropdown menu and **click Transfer Cart** to send your order to Shortgrass. You can use the comments box to send a message to Shortgrass regarding your order.
  
- f. **Email Shortgrass Acquisitions** ([acquisitions@shortgrass.ca](mailto:acquisitions@shortgrass.ca)) to let us know you’ve submitted a Hotlist Selection List cart on ULS.

Procedures:

Add ons and Fast Adds

Interlibrary Loan Procedures

## Interlibrary Loans and VDX training



(Source: VDX presentation held at Medicine Hat Public Library, 10.17.2016)

### Outline

- Introduction to VDX
- Borrowing:
  - Life Cycle of a Request
  - Work Queue
  - Trouble?
  - Examples
- Lending

### Important Documents and Resources

VDX Manual

Rota Codes for Alberta Libraries

Government Courier List

Canada Post Shipping Tool

<http://www.illalberta.ca>

<http://www.talonline.ca>

ILL Policy Directory



- VDX is a web-based interlibrary loan software that enables library staff to:

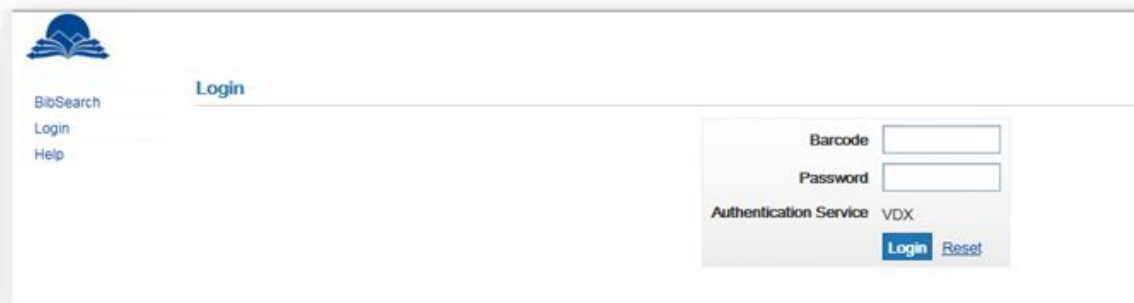
- Search multiple library catalogues simultaneously
- View the bibliographic and location details of any items retrieved
- Place a request for an item
- Manage the request through its lifecycle, from request to receipt to return
- Manage incoming requests from other libraries

## How to Access VDX

•**Note: VDX is optimized to use Firefox or Internet Explorer. It does not work as well with Chrome.**

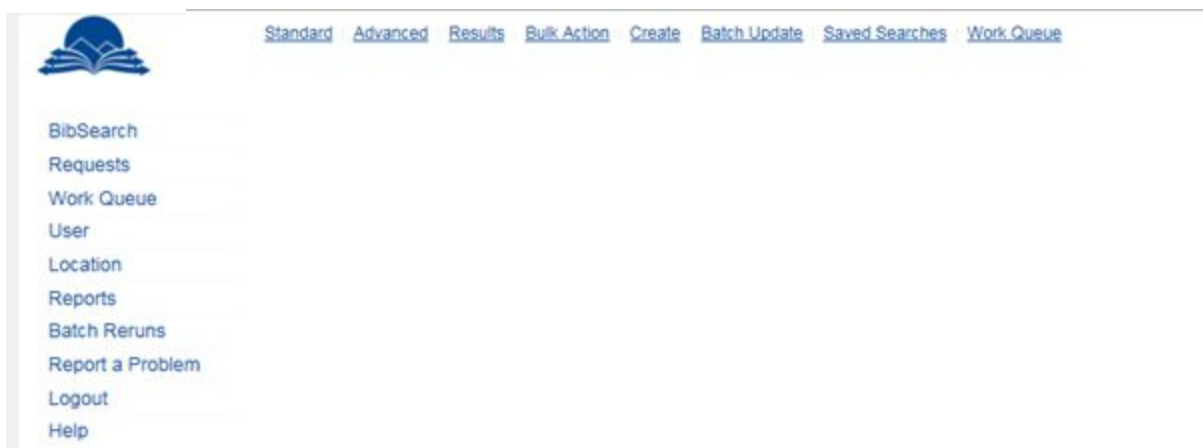
•**To access VDX go to: <https://alberta.vdxhost.com/vdx/>**

\*\*\***Avoid**\*\*\* **saving your password when logging in:** New autofill/password saving features in all browsers may attempt to autofill your VDX login username and password into the patron authentication fields every time you go to authenticate a patron. However, this will be a problem in the requesting stage of the ILL process - and as such, it is not recommended. If you need directions on how to remove the memory for the saved password, please contact either through phone or email and we can walk through the steps.



## Work Queue

•**The Work Queue gives you a quick view of all your active requests. It is the main tool you will use in VDX to manage your requests.** To access the Work Queue you click the Work Queue button on the menu bar at the left of the screen



Borrower		Lender	
Status	Count	Status	Count
<a href="#">Idle</a>	5	<a href="#">New Requests</a>	0
<a href="#">Idle / Check Manual</a>	1	<a href="#">New Requests Expiring Today</a>	0
<a href="#">Idle / Auth Manual</a>	3		
<a href="#">Pending &gt; 2 weeks</a>	36		
<a href="#">Pending</a>	74		
<a href="#">End of rota</a>	0		
<a href="#">Not Supplied</a>	0		
<a href="#">Terminated</a>	0	<a href="#">Will Supply</a>	0
		<a href="#">Conditional</a>	0
<a href="#">Informed Will Supply</a>	0	<a href="#">Cancel Requested</a>	0
<a href="#">Conditional</a>	0		
<a href="#">Cancel Pending</a>	0	<a href="#">New Notes</a>	0
<a href="#">New Notes</a>	0	<a href="#">Shipped</a>	0
<a href="#">Shipped</a>	54		
<a href="#">Shipped &gt; 2 weeks</a>	39	<a href="#">Renewal Requested</a>	0
<a href="#">Received</a>	200	<a href="#">Overdue Today</a>	0
<a href="#">Renew Pending</a>	0	<a href="#">Overdue &gt; 4 weeks</a>	0
<a href="#">Overdue</a>	2	<a href="#">Recalled</a>	0
		<a href="#">Returned</a>	0
<a href="#">Recalled</a>	0		
<a href="#">Returned</a>	92	<a href="#">Circulation Queue</a>	0
		<a href="#">Staff Review</a>	0
<a href="#">Circulation Queue</a>	0		
<a href="#">Staff Review</a>	0		
		<b>Reports</b>	
		<a href="#">Pick List</a>	0
		<a href="#">Shipping List</a>	0

Bureau - Chinook Arch

Lethbridge Public Library

This is what the work queue looks like  
The Work Queue page has a borrowing side and a lending side. Because Shortgrass headquarters takes care of many of the libraries lending, you should only see requests in the borrowing side.

**\*\*If you see a request appear on your lenders side, contact your HQ representative (Keltie) or just not supply it with a 'public note' suggesting they resend the request to Shortgrass HQ at AMS.\*\***

## **Life Cycle of a Request**

**There are 6 basic steps in the life-cycle of a request.**

**1.Create a Request** (The first would be the creation of a request, either by you or by a patron using TAL Online. )

**2.Status of Request** (The second would be what I have called the "Status of a request", basically meaning we've submitted the request, and now are waiting to see if someone will lend it to us, or if it will go to "end of rota". )

**3.Shipped!**

**4.Receive**

**5.Renew, Overdue, Recalled**

The last four steps are much simpler, and are: Shipping (the lender has shipped you the material), received (You receive the item, and check it out to your patron), Renewing, Overdue, Recalled (These are requests that are currently out to you patron, but demand some action on.)

**6.Returned**

The final stage is when the item is returned by the patron, and you send it back to the owning library.

## **Where do requests come from?**

**1.VDX – Bib search**

(This is a request that you have started by first searching for holdings within VDX, and then adding any missing information before sending it on. )

**2.VDX – Blank Form**

(There is no prior information to build from, and you must use a blank request page.)

**3.TAL online – Patron initiated**

(These requests are generally the standard for many libraries, except those with patrons who are accustomed to approaching library staff about creating requests.)

## VDX Bib Search

Find the Bib search page on the left menu bar, at the very top.

### Search example:

**Search:** Deja dead / Kathy Reichs (Audiobook)

[Standard](#) [Advanced](#) [Profiles](#) [Searches](#) [Create Request](#)

### Advanced Search

Use this form to conduct more advanced searches of Service Provider catalogues and other resources. To issue a simple keyword search of Service Provider catalogues use the [Standard Search](#) page.

[Search](#) [Reset Form](#)

Choose a field name (e.g., title, any) and the word or phrase you want to search (e.g., dickens, "black holes").  
Use AND, OR and AND NOT to combine or limit the search terms and make the search more specific.

Field	Search Term	Operator
Title		and
Author		and
ISBN		

Refinement  On  Off Records per page 10

Profile  
Current Profile: Alberta Public Libraries [shared]

[Collections](#)

#### Searchable Collections

- [Calgary Public Library](#)
- [Chinook Arch Regional Library System](#)
- [Edmonton Public Library](#)
- [Fort McMurray Public Library](#)
- [Parkland Regional Library](#)
- [Red Deer Public Library](#)
- [Shortgrass Library System](#)
- [St. Albert Public Library](#)
- [Strathcona County Library](#)
- [Trac-Marigold, Northern Lights, Peace, Yellowhead](#)

[Select all](#) [Deselect all](#)

**Narrow your search via the Filter (found under the Collections tab):**

Filter results by: Format(s) [ie. Book, Book on Tape [Audiobook], Large Print Book...], Language(s), Level(s)

[Format\(s\)](#)

- Article Printed
- Print Journal
- Book
- Part of Book
- Ejournal
- Article Online
- Music CD
- Video DVD
- Book on Tape
- Book on CD
- Patent
- Thesis
- Report
- Large Print Book
- Braille Book
- Computer File
- CD-ROM
- OTHER

[Select all](#) [Clear all](#)

[Language\(s\)](#)

- English
- French
- German
- Italian
- Spanish

[Select all](#) [Clear all](#)

[Level\(s\)](#)

- Adult
- General
- Juvenile


[Select all](#) [Clear all](#)

## Result Details


Record 2 of 4 | Collection: Alberta - Strathcona County and Fort Saskatchewan

< [Previous](#) [Next](#) >

 [Save](#)  [Request](#)

Title	<b>A deadly audio collection [audiobook cd] / Kathy Reichs.</b>
Format	Book on CD
Authors	Reichs, Kathleen J
Also Titled	Other title : Deja dead [audiobook cd] Other title : Death du jour [audiobook cd] Other title : Deadly desicions [audiobook cd]
Imprint	New York : Simon & Schuster, [2000?].
Description	14 compact discs (ca. 14 1/2 hr.) : digital ; 4 3/4 in.
Contents	Deja dead -- Death du jour -- Deadly decisions.
Performers	Read by Amy Irving and Katherine Borowitz.
Subjects	Brennan, Temperance (Fictitious character) -- Fiction. Forensic anthropology -- Fiction. Women anthropologists -- Fiction. Detective and mystery stories, American. Arson -- Fiction. Cults -- Fiction. Montreal (Quebec) -- Fiction. Quebec (Province) -- Fiction. Detective and mystery stories.
Other Authors	Irving, Amy Borowitz, Katherine
ISBN	9780743538558 
Language	
Language	English

### [Holdings](#)

	Location	Availability
	Strathcona County Library	Checked In

< [Previous](#) [Next](#) >

The request screen:

The record seems to indicate that this item is the desired title and format, as well as being available. This item will be requested.

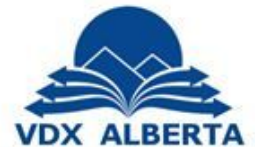
Request Page



-ESSENTIAL ELEMENTS:

- 1) Authorization Status is : “To be Authorized”  
(Ensures VDX will attempt to build a Rota)
- 2) Double check the Item Format (Book, Audiobook)

The screenshot shows a library system form with several sections. The 'Authorisation Status' dropdown is set to 'To be Authorised' and is circled in red. Below it, the 'Item Format' dropdown is set to 'Book on CD' and is also circled in red. To the right, a 'Patron' section contains fields for 'Patron Barcode', 'Authentication Service' (Chinook Arch Regional Library System), 'Patron Name' (JENNIFER 21817010382739), 'Patron Barcode' (21817010382739), 'Patron ID' (114026), 'Patron status' (PATR), 'Patron Email', and 'Amount willing to pay' (0). Below this, a 'Book' section contains fields for 'Our Local Number', 'Title' (A deadly audio collection (AUDIOBOOK) - circled in red), 'Subtitle', 'Author' (Reichs, Kathleen J;Irving, Amy;Borowitz, Katherine), 'Publisher' (Simon & Schuster), 'Place of Publication' (New York), 'Date' ([2000?]), 'Edition', 'Any Edition', 'Item Description' (14 compact discs (ca. 14 1/2 hr.) : digital ; 4 3/4 in.), and 'ISBN' (9780743538558 - circled in red). At the bottom right, there are 'Request' and 'Reset' buttons.

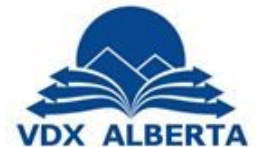


## Creating a Patron profile

If your patron hasn't done an Interlibrary loan and isn't entered into VDX system, you'll have to create a profile for them.

# Creating a Patron

The screenshot shows the 'User Details' form in the VDX ALBERTA system. The form is titled 'User Details' and has a navigation menu on the left with options: BioSearch, Requests, Work Queue, User, Location, Reports, Batch Reruns, Report a Problem, Logout, and Help. Below the menu are 'Barcode' and 'ALCA' links. The form itself has a top navigation bar with 'Search', 'Results', 'Create', and 'Profiles'. The form fields are: Barcode (with a red arrow pointing to it), Password, Confirm Password (with a checked 'Update Password' checkbox), Alternative Barcode, First Name (with a red arrow), Surname (with a red arrow), E-Mail (with a green arrow), Category (set to 'Patron'), Join Date (with a red arrow and example '(e.g. 1 Sep 2003)'), Expiry Date (with a red arrow and example '(e.g. 1 Sep 2003)'), Location (set to 'Chinook Arch Regional Library System'), Banned in VDX (set to 'No'), Has Presigned Copyright (set to 'No'), and Default Pickup Location (with a green arrow pointing to it). The form has 'Save' and 'Cancel' buttons at the top and bottom.



Creating a patron profile:

On the menu to the left of the screen, click on “user”

Once there, go to the menu on the top of the screen and select “Create”

Then enter in the relevant information.

The needed information is: Barcode, First and Surname, location, and category.

NOTE:

Re: The expiry date: DO NOT put in an expiry date, as this will cause problems in the future. If you have a user record that has an expiry date already filled in, set it a few decades from now\*\*\*

Searching for a particular format:

## Example 2: Searching for a irregular item: Large Print copy Specifying the format from the “Advanced Search Page.”

The screenshot shows the 'Advanced Search' interface. At the top, there are navigation links: Standard, Advanced, Profiles, Searches, and Create Request. Below these is a sidebar with various user actions like BioSearch, Requests, Work Queue, User, Location, Reports, Batch Renew, Report a Problem, Logout, and Help. The main content area contains a search form with three columns: Field, Search Term, and Operator. The 'Field' column has dropdown menus for Title, Author, and ISBN. The 'Search Term' column has three empty text input fields. The 'Operator' column has dropdown menus set to 'and'. Below the search form, there are options for 'Refinement' (On/Off) and 'Records per page' (set to 10). A 'Current Profile' dropdown is set to 'ALL [shared]'. Underneath, there is a section for 'Searchable Collections' with a list of 20 libraries, each with a checked checkbox. At the bottom, there is a 'Filter results by:' section with a 'Formats' sub-section containing a list of 16 item types, with 'Large Print Book' selected.

Standard Advanced Profiles Searches Create Request

Use this form to conduct more advanced searches of Service Provider catalogues and other resources. To issue a simple keyword search of Service Provider catalogues use the [Standard Search page](#).

Search Reset Form

Choose a field name (e.g., title, any) and the word or phrase you want to search (e.g., dickens, "black holes").  
Use AND, OR and AND NOT to combine or limit the search terms and make the search more specific.

Advanced Search

Field	Search Term	Operator
Title		and
Author		and
ISBN		

Refinement  On  Off Records per page 10

Profile

Current Profile: ALL [shared]

[Collections](#)

**Searchable Collections**

- [AMICUS](#)
- [Athabasca University](#)
- [Calgary Public Library](#)
- [Chinook Arch Regional Library System](#)
- [Edmonton Public Library](#)
- [Lethbridge College](#)
- [Mount Royal College Library](#)
- [NEOS \(including University of Alberta\)](#)
- [NorQuest College Library](#)
- [Northern Alberta Institute of Technology Libraries](#)
- [Northern Lakes College Library](#)
- [Parkland Regional Library](#)
- [Prairie Bible Institute](#)
- [Red Deer Public Library](#)
- [SAIT Library](#)
- [Saskatchewan Public Libraries \(SILS\)](#)
- [Shortgrass Library System](#)
- [St. Albert Public Library](#)
- [Strathcona County Library](#)
- [The Banff Centre, Paul D. Fleck Library](#)
- [Trac, Mariqold, Northern Lights, Peace, Yellowhead](#)
- [Univ. of Lethbridge and Medicine Hat College Catalog](#)
- [University of Calgary Library](#)
- [Wood Buffalo Regional Library](#)

[Select all](#) [Deselect all](#)

**Filter results by:**

[Formats](#)

- Article Printed
- Print Journal
- Book
- Part of Book
- Ejournal
- Article Online
- Music CD
- Video DVD
- Book on Tape
- Book on CD
- Patent
- Thesis
- Report
- Large Print Book
- Braille Book
- Computer File

Results:

2 Collections were identified:

- Pick one record and select: “Request”

## Example #2

Once selected, check that the:

- Authorization Status is :  
"To be authorized"
- The ISBN is present
- Make a further note of the irregular format by adding in (LARGE PRINT) after the title.
- Double check that the patron is Authorized and then select "REQUEST"

The screenshot shows a library request form with several sections. The 'Authorisation Status' dropdown is set to 'To be Authorised'. The 'Item Format' dropdown is set to 'Large Print Book'. The 'Service Details' section shows 'Service 1' with 'Service Type' set to 'Loan' and 'Media Type' set to 'Other'. The 'Item Details (Book)' section contains the following information:

Our Local Number	
Title	Deja dead (LARGEPRINT)
Subtitle	
Author	Reichs, Kathy
Series Title & Numbering	Temperance Brennan series (Reichs, Kathy)
Sponsoring Body	
Publisher	Thorndike Press
Place of Publication	Thorndike, Me.
Date	1998.
Edition	
Any Edition	
Item Description	663 p. ; 29 cm.
ISBN	9780786212651,0786212659

The 'Patron Barcode' field is empty, and the 'Authentication Service' is set to 'Chinook Arch Regional Library System'. The 'Patron Name' is 'JENNIFER 21817010382739', 'Patron Barcode' is '21817010382739', 'Patron ID' is '114026', and 'Patron status' is 'PATR'. The 'Patron Email' field is empty, and the 'Amount willing to pay' is set to '0'. The 'Request' button is highlighted in blue, and the 'Reset' button is a link.

## **Appendix -- Facility Use Procedures and Guidelines**

**There are 3 categories of potential users of the facility**

- SLS Board and staff
- SLS member municipalities and member library boards/staff
- Non-SLS agencies

### **SLS Board and Staff Use**

Use by the Board and staff take precedence over other requests, provided appropriate booking procedures are followed.

### **Use by SLS Member Municipalities and Member Library Boards/Staff**

Use by the above groups will be at no charge during business hours, except for coffee service.

If the facility is requested for non-business hours, then a charge of \$50 per half day or evening may be necessary, plus coffee service fees. Room availability is dependent upon staff availability and CEO approval.

### **Use by Non-SLS Agencies**

Use by the above groups will be at a nominal charge of \$50 per half day during business hours. Coffee service will be available at an additional fee.

If the facility is requested for non-business hours, then a charge of \$75 per half day or evening may be necessary, plus coffee service fees. Room availability is dependent upon staff availability and CEO approval.

### **Bookings**

- All bookings must be made through the Executive Assistant.
- All users, other than SLS Board and staff, must complete the facility usage/rental agreement prior to use.
- Signers of rental agreement must be 18 years old or older.
- Facility will not be available on statutory holidays.
- No alcohol usage is permitted.
- Hours of use are at the discretion of the CEO.
- Cancellations of evenings and weekend bookings must be made at least two full business days in advance of the booking date. SLS reserves the right to apply full charges to renters who provide less notice.

### **Responsibility**

- The user/renter is responsible for the due care of the facilities and contents.
- All young adults and children must be under supervision.
- If the user/renter will be advertising the event, then the following statement must be part of the advertisement.
  - Use of the SLS Board Room by a community group does not imply SLS endorsement of the aims and objectives of the group.
- The user/renter shall be financially responsible to the Board for all loss or damage to the facilities by any person(s) admitted to the facility by the user/renter.

- The SLS supervising employee shall have the authorization to request that the renter vacate the premises due to inappropriate conduct or overstaying of time.
- The SLS CEO's decisions shall be final in all matters pertaining to the interpretations of these procedures and guidelines.

**Additional Fees**

Coffee or Tea at \$5 per pot.