



NRE/VDX

Web Admin Manual: Managing Requests

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Version: 8
Software Version: NRE/VDX 8.x
Authors: OCLC
Reviewers: OCLC

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1 FINDING AND REVIEWING REQUESTS

1.1 NRE/VDX ACTIONS AND STATUSES

NRE/VDX monitors the database continuously to identify requests and actions requiring processing. When a request is placed or another action performed on a request, the status of this request will change.

Actions taken on a request change the ILL Status of the request. Actions are determined by the responder's method of communication with **NRE/VDX** (Internal ILL, Email or ISO-ILL) and the current status of the request.

The **Status** of a request defines its current position in the request lifecycle. For example, a new request is set at **Idle** status before the action of **Request** is performed to change the request to **Pending** status and send it to the first responder on the rota. Once the Received action is taken on a request, its status will change to **Received**.



It can take a few minutes for a change of status to take effect in **NRE/VDX** so be patient if a request's status does not appear to update immediately.

There are 3 ways to search for ILL requests to manage.

Work Queue

Standard Search

Advanced Search

Each method will be described here in detail in the following sections.

NRE/VDX does not support multiple windows/tabs within a browser. If you have to have another window open you will need to use another browser.



1.2 THE WORK QUEUE

The **Work Queue** gives you a quick view of all your active requests, both as borrower and as lender. It is the main tool within **NRE/VDX** for managing your requests.

To access the Work Queue click the **Work Queue** button on the menu bar at the left of the screen

VDX

[BibSearch](#)

[Requests](#)

[Work Queue](#)

[User](#)

[Location](#)

[Reports](#)

[Batch Reruns](#)

[Logout](#)

[Help](#)

Or, if you are in the Requests domain from the link at the top of the screen:

[Standard](#)

[Advanced](#)

[Results](#)

[Bulk Action](#)

[Create](#)

[Batch Update](#)

[Saved Searches](#)

[Work Queue](#)



The Work Queue screen will be displayed:

Borrower		Lender	
Status	Count	Status	Count
Idle / Check Manual	2	New Requests	0
Idle / Auth Manual	2	New Requests Expiring Today	0
Pending > 2 weeks	0		
Pending	1		
End of rota	3		
Terminated	0		
		Will Supply	0
Conditional	0	Conditional	0
Cancel Pending	0	Cancel Requested	0
New Notes	0	New Notes	0
Shipped	2	Shipped	0
Shipped > 2 weeks	2		
Received	17		
Renew Pending	0	Renewal Requested	0
Overdue	0	Overdue Today	0
		Overdue > 4 weeks	0
		Recalled	0
Returned	0	Returned	0
Reports		Reports	
Received List	0	Pick List	0
Returned List	0	Shipping List	0
Received Label	5		
Published Saved Searches			
Name	Count		
Received Electronically	13		

NOTE: The Work Queue is customizable, so your work queue may not look exactly like the one shown here.

Requests are grouped by their status.

The **Borrower** column displays requests which you or your patrons have requested from other libraries. For example, here you can see requests that are waiting to be authorized and sent to potential lenders, (Idle, Auth Manual), requests that need staff attention before being sent out (Idle, Check Manual), requests that are at a responder location, (Pending), items that have been shipped to you (Shipped),



items you have borrowed which have passed their due date (Overdue). The Borrower column also indicates supporting reports that are ready for printing.

The **Lender** column displays requests for items in your collection made by other libraries.

The number in the **Count** column is the sum of requests for each status.

You can click on the **Count** number or the **Status** to display the set of requests.

Results for: Borrower - Idle / Auth Manual

Sort by ILL Number descending ascending [Sort](#)

Sort by descending ascending

[Save Search](#)

Number of Results: 3

Bulk Action: Select all Deselect all [Bulk Action](#)

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20661 ** MnLINK Requester

The cat

Richards, Dorothy Silkstone;Maggitti, Phil | ISBN: 086101703X

Status: Idle Authorisation: ~~AutoMediated~~AuthManual Last Action: REQUEST Rota: 1 of 1

REQUEST [Action](#) [Details](#) Mark as Read [Print](#)

20349 ** MnLINK Requester

Mr. Wuffles

Berneis, Susie;Wiesner, David;Motion picture adaptation of: Wiesner, David Mr. Wuffles;Dreamscape Media. | ISBN: 9780977709861;0977709868

Status: Idle Authorisation: ~~AutoMediated~~AuthManual Last Action: REQUEST Rota: 1 of 1

REQUEST [Action](#) [Details](#) Mark as Read [Print](#)

1.3 THE STANDARD ILL REQUEST SEARCH

The Standard Search screen is accessed by clicking on the **Standard** option from the top menu bar. These searches are designed to return hit faster than the Advance search.

[Standard](#) [Advanced](#) [Results](#) [Bulk Action](#) [Create](#) [Batch Update](#) [Saved Searches](#) [Work Queue](#)

A single list of simple request search options displays irrespective of borrower/lender role.



ILL Request Search

ILL numbers (ILL no, Local Request Number)

Item Number

ISBN / ISSN

Title / Author Keyword

Patron Barcode

Patron Name

Request Due Date

Borrower Code

Lender Code

Requests Assigned To Me

Search Bureau

Search Criteria

Records per page 10 ▾

[Reset Form](#)

A note about Keyword searching: The searches in the standard and advanced search screen that use words rather than unique numbers are keyword searches. As such, you can add operators to your search to retrieve more specific results. Here is the syntax that you can use in your searches to refine your results:

- If the search string is within double-quotes (meaning "I only want records with this string as a phrase"), then it will find records with all these words (but not words like them) in that order in the record.
- Boolean operators can be used (AND, OR and NOT and their respective symbols). The operators must be in upper case or they will be considered stop words.
- Nested logic is also supported. eg. (word1 OR word2) NOT word3.
- Proximity searching is supported. Eg. The search term word1(3)word2 means find any records with word1 or words like it within 3 words of word2 or words like it.
- The punctuation characters ", \ { < >:" are converted into a space
- The punctuation characters "- ! ?" are removed
- Stop words are removed. The stop words are: the, a, an, and, or, not, of, in, on, at, from, to, is, for, about, with, which, who.
- Forced phrase search: if you precede the search string with "#*", this forces the search string to be a phrase
- Reverse default Boolean operation: If you prefix the search term with #! then the default Boolean operation will be "or" instead of "and"

In the following table, the keyword searches are identified by an asterisk (*)



ILL Numbers	The request number you received when your request was confirmed, the local request number, the other party's request number. This is the only search on this screen that will retrieve completed as well as active requests
Item Number	The physical item number (item barcode) entered when an item is shipped or received.
ISBN	The ISBN in the request
ISSN	The ISSN in the request
Title/Author Keyword*	The words of the Requested Title or author retrieved regardless of where it is in the title
Patron Barcode*	The ID of the patron requesting the item
Patron Name*	The first and last name of the patron requesting the item
Request Due Date	The date the lender specified as the due date for the item
Lender/Borrower Code*	The location code/description or name of the current partner in the request
Request Assigned To Me	If you are using the Lock and Unlock functionality, this option will list all request assigned (that you have locked). You do not have to enter "search Criteria"

1.4 THE ADVANCED ILL REQUEST SEARCH

Sometimes you will want to do a more complex search for ILL requests. The Advanced ILL Request Search allows you to limit searches and combine conditions using Boolean operators, to do more refined searching. These searches are slower than the Standard searches because they are created on the fly. It is not uncommon for a search to take a minute or two to return hits.

You can access the Advanced ILL Request search by clicking the **Advanced** link in the top menu bar.

[Standard](#) [Advanced](#) [Results](#) [Bulk Action](#) [Create](#) [Batch Update](#) [Saved Searches](#) [Work Queue](#)

ILL Request Search

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

Your Library's Role

Lender

Borrower

Both

Display sent messages only

Display Terminated requests

Display Not Supplied requests

Display circ error requests only

Search Bureau

Do not include Completed requests

Include Completed requests

Completed requests only

Request Status

Status

Authorisation Status

Last Action

Any Action

Process Status

Service Level

Service Type 1

Log Message Type

Circ Error Type

Format

Under Your Library's Role:

You can search for requests you have placed by selecting the **Borrower** option in the Your Library's role section, or monitor requests for which you are the responder by selecting the **Lender** Option. Selecting Both will return request for Borrower and Lender.

 It is strongly recommended that you select either Borrower or Lender when using the advance search. Selecting **Both** will slow down the search and if you save the search it will not work if you publish the search to be displayed on the Work Queue.

You can specify the type of results that will display by selecting the appropriate display options:

Check box options allow you to select more than one option.

Display sent messages only: to only display requests that have been sent to potential lenders. Requests with a status of Idle will not be displayed when this box is checked.

Display Terminated requests: to include requests that have been cancelled by the end user or terminated by staff.



Display Not Supplied Requests: to include requests that have a status of Not Supplied in the results set. If this box is not ticked, **NRE/VDX** will not show Not Supplied requests as they are no longer active.

Display circ error request only: to include requests that contain Circ integration errors.

Search Bureau: (If configured) will include all requests for all locations in the Bureau.

Radio buttons allow you to select only one option.

Do not include Completed request: by default, **NRE/VDX** does not display completed requests. .

Include Completed request: search will include requests that have been completed'

Completed request only: search will only contain completed requests in your search results.



To retrieve all results for your search, you should check *both* **Include Completed** requests and **Display Not Supplied Requests**

Request Status:

You can also limit your search by the qualities of the request.

Status	The status field of the request. More than one status may be selected by using the Shift+Click or Ctrl+Click selection methods.
Authorization status	The current authorization status of the request – the progress of the request within its current status.
Last Action	The last action that the borrower or lender performed on the request. This may be an action that you performed or it may be an action that your request partner performed ('Indication').
Any Action	Any action that the borrower or lender performed on a request at any time in the process.
Service Level	The level of service the lender should provide, such as Normal or Rush.
Service Type 1	The type of service being requested, such as Loan or Copy.
Log Message Type	The type of problem encountered during NRE/VDX processing, such as 'End of Rota Reached' and 'Local Location on Rota'.
Circ Error Type	Type of circ error returned to NRE/VDX such as Action Failed, Connection Failed, etc.
Format	The format of the item, such as Book, Article, DVD, etc.



Other Fields:

The **Other Fields** section allows you search for specific ILL requests placed. You can use Boolean operators - *and*, *or*, & *not* to further define your search.

Other fields

Or
 Or

You can search on the following fields:

ILL Number	The NRE/VDX request number
OCLC Number	The OCLC number of the title
Local Request Number	The borrower's local request number
Patron Name*	Search on the name of the requesting user..
Patron ID	The internal NRE/VDX identifier for the patron.
Patron Barcode	The identification the patron uses in NRE/VDX to authenticate himself.
Patron Status	The user category of the patron
Borrower Code	The identifier for the requesting location e.g. the OCLC or LAC symbol.
Lender Code	The identifier for the responding location e.g. the OCLC or LAC symbol.
Due Date	The date specified by the responder when the item should be returned to the responding library.
Date Created	The date the request was first created.
Date Shipped	The date the Shipped action was taken on the request.
Need by Date	The date by which the item is needed as specified by the lender.
Expiry Date	The date the request will move on from its current responder if there is no response.
Title / Author Keyword*	Retrieves matches on the title and author in the request which include your search term.
ISBN / ISSN*	The ISBN or ISSN entered when the request was created.
Audit No.	A control number given to each transaction performed on a request. You are unlikely to use this.
Supplier Reference	A number sent by the supplier indicating how the request is identified in that system. <ul style="list-style-type: none"> - WSILL: this is the WSILL ILL number - ILLiad: this is the ILLiad number
Shipped item	The item barcode on the physical item sent by the lending library.



Circulating item	The item barcode given to the physical item when received by the borrowing library.
Local Due Date	The date calculated by NRE/VDX for the patron due date
Receive Date	The date the item was received
Returned Date	The date the item was returned
Status Change Date	The date the status changed for the item
Service Time Date	The date the last time something was done to the request
Original Service Date	Not likely to be used

The astrix denotes keyword searches.



To search within a date range using any of the date fields you can use the following format;
For a date range from the first of June to October 7 2014 enter this: 1 Jun 2014 - 7 Oct 2014
For the just the day of June 1st 2014 enter this: 1 Jun 2014

Example:

Other fields

Date Created	1 Jun 2014 - 7 Oct 2014	Or	
--------------	-------------------------	----	--

Sort by allows you to choose a field from the list box by which to order the list of requests, for example, ILL Number, Status, Last Action.

Format indicates how the search results will look. **Standard** is used as the default and displays brief records on screen. **Print** displays a full print view of each request retrieved.

You may also specify how many requests should display per page. The default is 10 requests per page.

Sort by	ILL Number	▼	<input checked="" type="radio"/> descending	<input type="radio"/> ascending
Sort by		▼	<input type="radio"/> descending	<input type="radio"/> ascending
Format	<input checked="" type="radio"/> Standard <input type="radio"/> Print			
Records per page	10 ▼			
<input type="button" value="Search"/> Reset Form				

After you have displayed the results of a request search you can begin to manage the requests. For each item listed you can:

Select an appropriate action and click the **Action** button to progress the request.

Acknowledge the request as read.

Display the item **Details** (see below). From the details, you can also perform an **Action** on the request.



Print the request.

Select requests for **Bulk Action** (see Chapter 4).



1.5 PUBLISHED SAVED SEARCHES

ILL staff are able to save and make their ILL searches public to other staff users, once a search is saved. Your system may not be configured to allow this functionality.

First enter a search with any filters you want to use and click on “Search”

ILL Request Search

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

Your Library's Role

Lender
 Borrower
 Both

Display sent messages only
 Display Terminated requests
 Display Not Supplied requests
 Display circ error requests only
 Search Bureau

Do not include Completed requests
 Include Completed requests
 Completed requests only

Request Status

Status
Borrower Received
Borrower Renew Pending
Borrower Returned
Borrower Returned: Lender Overdue

Authorisation Status

Last Action

Any Action

Service Level

Service Type 1

Log Message Type

Circ Error Type

Format
Print Journal
Book
Part of Book
Ejournal

Other fields

Or

Or

Sort by descending ascending

Sort by descending ascending

Format Standard Print

Records per page

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



Once the results are displayed, click on the “Save Search” link to save the search.

Results for: Advanced Search

Sort by descending ascending [Sort](#)

Sort by descending ascending

[Save Search](#)

Number of Results: 5

Bulk Action: [Select all](#) [Deselect all](#) [Bulk Action](#)

Our Number / Their Number ** Borrower / Lender ** Item Barcode

<input type="checkbox"/>	14114 ** MnLINK Requester
	Woodworking
	John Kelsey ISBN: 9781565233539
	Request No Longer Required
	Status: Completed - Idle Authorisation: Processed Last Action: Complete:04 Sep 2013 Completed Date: 26 Feb 2014 Rota: 1 of 1

REQUEST [Action](#) [Details](#) [Mark as Read](#) [Print](#)

Enter a description and click on “Save” to save the search. The search terms, limits and filters are saved so that the same search can easily be rerun later.

Save Request Search

[Save](#)

Now that the search is saved you can now publish it. To publish the search, click the “Publish” link.

Saved Request Searches

My Searches [Published](#)

Search Name: Terminated Request

Created: 12 Nov 2012

Last Used: 12 Nov 2012 09:40:11

Options: [Publish](#) [Explain](#) [Run](#) [Edit](#) [Delete](#)



Enter a description and click "Publish". This description will be displayed in the work queue.

Publish Request Search

Saved Search Description Terminated Request

Enter a description to appear in the work queue

Work Queue Item Description

Publish

The published search will be made available in the work queue.

Published Saved Searches	
Name	Count
Lost	0
IDLE - check manual	0
Terminated Request	1



1.6 REQUEST DETAILS

After a search or clicking on a work queue category you are taken to a page of brief results.

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20661 / 20662 ** MnLINK Requester / MnLINK Responder

The cat
 Richards, Dorothy Silkstone;Maggitti, Phil | ISBN: 086101703X

Status: **Pending** Authorisation: **Processed** Last Action: **REQUEST:17 Nov 2014** Rota: 1 of 1

Action [Details](#) Mark as Read Print

Click on the **Details** button from request search results to view the entire request. (Shown in two parts)

Request Details

Reports available: OCUL - Requester picklist **Run** Actions available: Add Private Note **Action** [Previous](#) [Next](#)

[Request Details](#)

Request ID

Our Number 20661
Their Number 20662
Item Format Book

Status Pending
Authorisation Status Processed

[Service Details](#)

Service 1		Service 2	
Service Type	Loan	Service Type	None
Media Type	Printed	Media Type	None

[Item Details \(Monograph\)](#)

Title The cat
Subtitle
Author Richards, Dorothy Silkstone;Maggitti, Phil

Series Title & Numbering
Sponsoring Body
Publisher Salamander Books
Place of Publication London
Date c1993.
Edition Rev. ed.
Any Edition

Item Description 192 p. : ill. (chiefly col.) ; 31 cm.
ISBN 086101703X
Volume
UPC
Classmark
Call Number
Additional Nos
Ref. Source St Paul PL/INNOPAC



▼ Patron Details

Name Ralph Horton
Patron Barcode RHORTON
Patron ID 25
Patron Status BUSYS
Email rhorton@everestkc.net horton.ralph@gmail.com
Amount willing to pay 0.00

▼ Additional Service Details

Requested By Doger - MnLINK Requester
Service 1 Loan
Service Level Normal - Local Search
Number of Items Shipped 1
Entry Date 12 Nov 2014 16:14:56
Expiry Date 21 Nov 2014
Need by Date 29 Nov 2014

Charges

Max. Cost 0.00 USD
Cost To Patron 0.00

▼ Delivery Details

Send To

Suite 240
 7400 W 132
 Overland Park
 Kansas
 66213
Email hortonr@oclc.org

Pickup Location [Doger - MnLINK Requester](#)

▼ Rota Details

Seq	Location	Status
1	Roger - MnLINK Responder	

▼ History

Lender	Action	Status	Date Changed	Authorised By
Roger - MnLINK Responder	REQUEST	Pending	17 Nov 2014 10:24:52	Horton

Reports available: Actions available: [Previous](#) [Next](#)

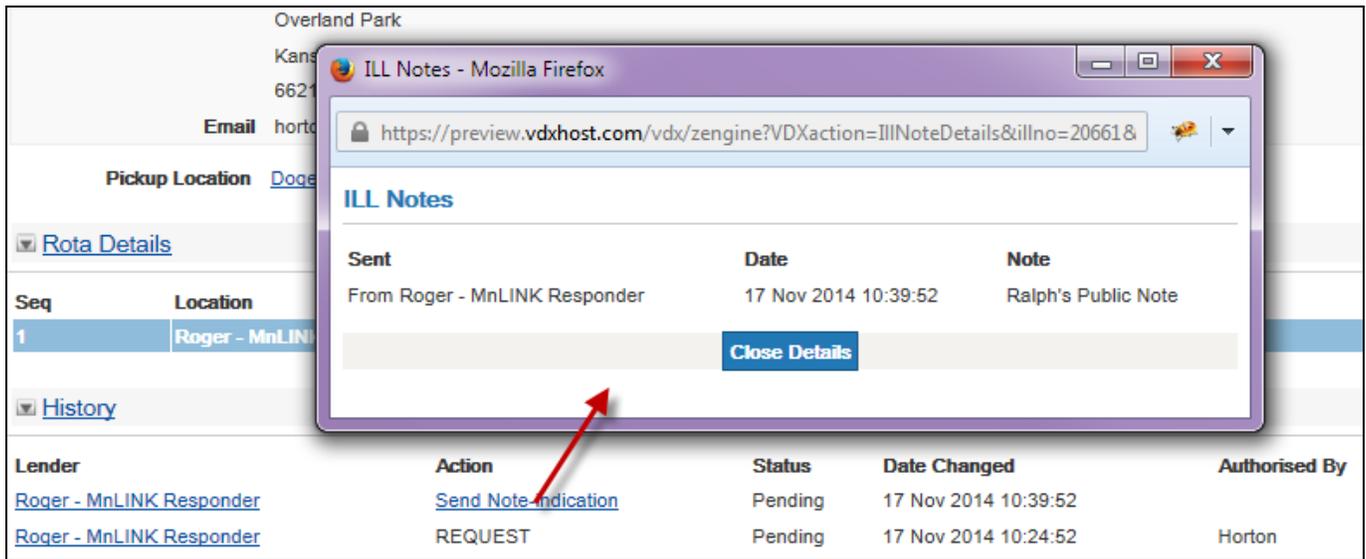
From the Request Details Screen you can view the entire request in its current state, including:

- The request's rota and which Lending library is currently dealing with the request. The current lender is highlighted.

Rota Details					
Seq	Location	Status			
1	Roger - MnLINK Responder				

History					
Lender	Action	Status	Date Changed	Authorised By	
Roger - MnLINK Responder	Send Note-indication	Pending	17 Nov 2014 10:39:52		
Roger - MnLINK Responder	REQUEST	Pending	17 Nov 2014 10:24:52	Horton	

- check the request's progress and any problems in the History section. Any notes attached to the request can also be seen in the History section, underlined under the Action heading. Clicking on the underlined link will open the details of the note in a popup window.



- Select the appropriate next Action for the request from the drop-down which appears at the top and bottom of the screen. Also each action will identify the staff member authorizing it.

Request Details					
Reports available:	Standard Received List	Run	Actions available:	Add Private Note	Action
				Mark as Unread	Previous Next



2 MANAGING REQUESTS AS A BORROWER

2.1 THE BORROWER WORK QUEUE

Requests you have sent to **NRE/VDX** lending libraries will have their status updated automatically as the lender takes Actions to update the request on their side. You may also need to manually update the status of some requests about which you have received emails from non **NRE/VDX** lenders who do not have an automated ILL system.

The Borrower side of the work queue shows the requests you may need to manage as the borrowing library.

Borrower	
Status	Count
Idle / Check Manual	2
Idle / Auth Manual	2
Pending > 2 weeks	0
Pending	1
End of rota	3
Terminated	0
Conditional	0
Cancel Pending	0
New Notes	0
Shipped	2
Shipped > 2 weeks	2
Received	17
Renew Pending	0
Overdue	0
Returned	0
Reports	
Received List	0
Returned List	0



2.2 *BORROWER WORK QUEUE STATUSES*

You will probably want to check the Work Queue at least once a day and take action on each request which is at a status requiring action. The work queue categories are:

Idle – (If configured) all requests that are “Idle”.

Idle, Check Manual – these are requests which need staff intervention before they can be sent out to the first responder. Common reasons for the Check Manual authorization status are: request is a duplicate, rota is empty (no locations could be found), or that the request is held locally. Look at the request history to find the reason the request needs staff review.

Idle, Auth Manual – these are requests which have not yet been authorized and have therefore not yet been sent to potential lenders. You need to perform the Request action and set the authorization status to ‘Authorized’ to send them to the first responding library on the rota. This step will not be needed if you decided to allow **NRE/VDX** to auto-authorize your requests.

Pending > 2 weeks – you may wish to check the history of these requests to see why they are taking so long to satisfy. If a request has been with the same lender for a long time, you may want to contact the lender for more information.

Pending – These are requests that have been sent to a lender but have not yet been shipped or rejected.

End of rota – these are requests where every library on the rota has either declined to lend or not responded to the request, allowing it to expire. You need to add locations to the rota for these requests, or complete the request.

Terminated – Requests that are no longer needed. A request can be terminated by the library staff or by the patron, if given permission in ZPORTAL. A request will stay in this category until the current lender agrees to the cancellation of the request.

Informed Will Supply– (if configured) Requests sent to lenders who do not use an automated ILL system. When the borrowing library gets notification outside of NRE/VDX that the item will be shipped, the Informed Will Supply action can be performed.

Conditional – The lender is stipulating a condition on the loan of this material. You must respond with a Yes or No reply indicating if you are willing to comply with the condition.

Cancel Pending – Requests that have been cancelled from the current lender and are waiting for approval of the cancellation.

You should check any **New Notes** which are flagged in the Borrower Work Queue. A request will be counted in New Notes when the lender has sent a note that does not update the request status.



Shipped – The lender has sent NRE/VDX a notification that the item has been shipped. Requests in this category are candidates for the Received action.

Shipped > 2 weeks – These are requests that may be lost in the post. The lender notified NRE/VDX more than 2 weeks earlier that the item had been shipped and you have not yet indicated that you have received it. You may need to contact the lending library and begin a claim process for the item.

Received – Requests which you have acknowledged have been received in your library. Requests in this category are candidates for the Returned action.

Renew Pending – Requests for which you have asked the lender for a renewal. The renewal has not yet been granted.

Overdue – requests on loan to your library which are past their due date for return - these should be returned or renewed as soon as possible

Recalled – requests on loan to your library which have been recalled by the lending library - these should be returned as soon as possible

Returned – requests which you have returned to the lending library. The lending library has not yet sent confirmation that they have checked the item back into their collection.

Circulation Queue – requests for circulation systems that are offline. NRE/VDX will attempt to connect and push the request through when the system is eventually available.



2.3 BORROWER REQUEST MANAGEMENT – WORKFLOW TASKS

2.3.1 Authorizing Idle Requests

Before a request can be sent to potential responders, it must be **Authorized**.

Many **NRE/VDX** systems are configured to automatically authorize requests if the request is validated and a rota is built. Other systems are configured to require the staff to authorize every new request.

If your **NRE/VDX** is configured to manually authorize a request or when a request cannot be validated or no rota can be built, you will have to review the request, resolve any issues and then authorize it.

To authorize a single request, you can either retrieve the request from the Idle/Auth Manual or Idle/Check Manual section of the Borrower Work Queue or from a Request search, by its ILL number or other key.

Borrower	
Status	Count
Idle	11
Idle / Check Manual	6
Idle / Auth Manual	6
Pending > 2 weeks	4
Pending	4
End of rota	7
Terminated	0

Our Number / Their Number ** Borrower / Lender ** Item Barcode

12870 ** CDL Responder

From eternity to here - the quest for the ultimate theory of time

Carroll, Sean M 1966- | ISBN: 0525951334;9780525951339

Status: **Idle** Authorisation: **AutoMediated:AuthManual** Last Action: **REQUEST** Rota: 1 of 2

From the brief results select the action 'Request' and click the Action button. This opens the request up in edit mode and it can now be modified and authorized.



[Request Details](#)

Authorisation Status:

Item Format:

Our Number: 12870

You will note that the Authorization Status is now set to **'Authorized'**.

You may want to review the rota before authorizing the request. You may need to add locations to the rota if none were found as part of the DocFind process. The rota can be checked, locations added and the sequence changed as appropriate.

[Rota Details](#)

Holdings [Found](#)

Available

Selected

Roger - MnLINK Responder

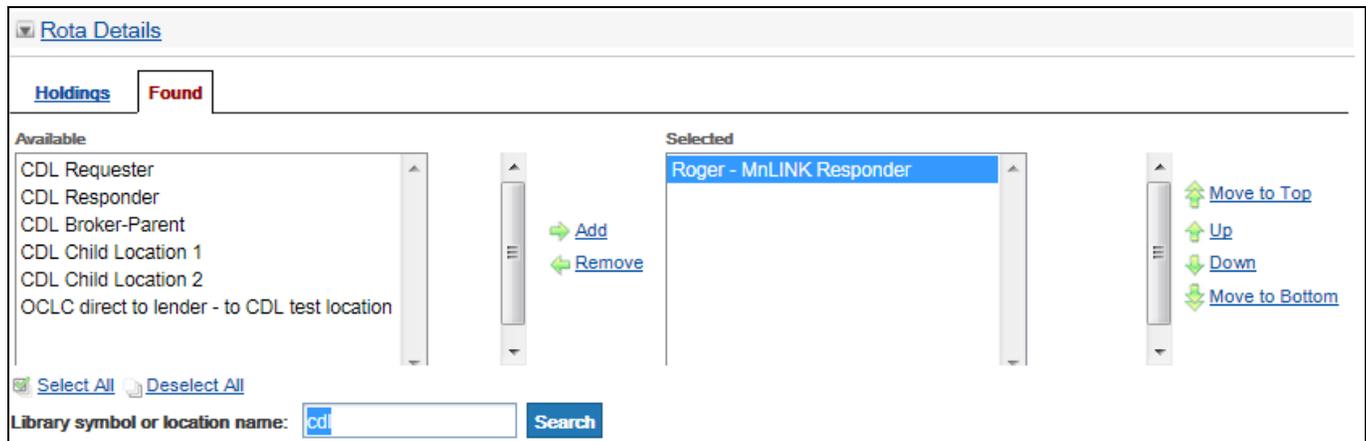
[Add](#) [Remove](#)

[Move to Top](#) [Up](#) [Down](#) [Move to Bottom](#)

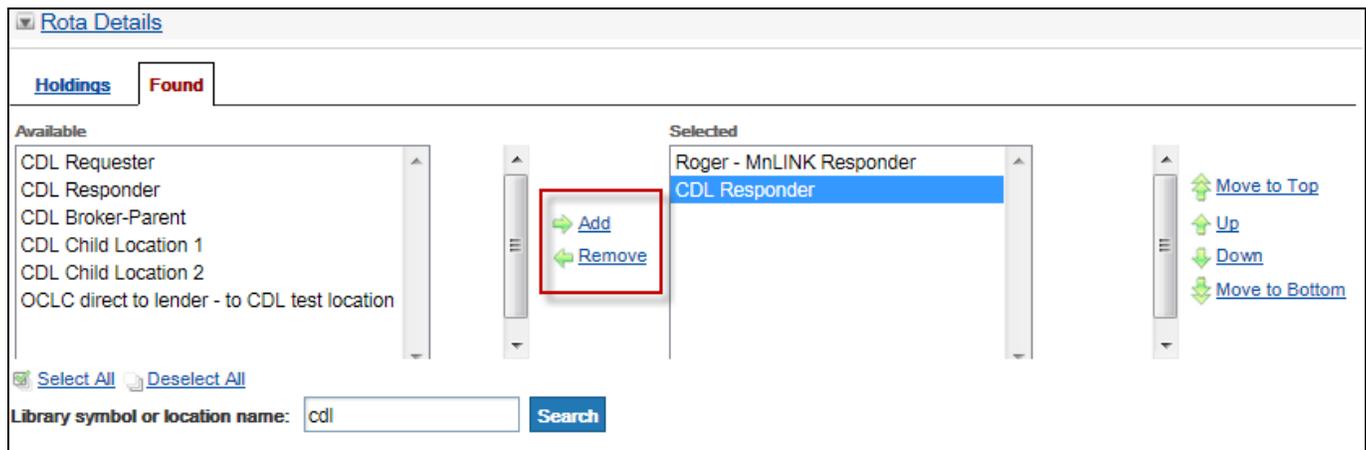
[Select All](#) [Deselect All](#)

Library symbol or location name: [Search](#)

To add locations to the rota, enter the symbol or part of the name in the 'Library symbol or location name' box and click the Search button. In the example below, 'CDL' was entered in the search box.



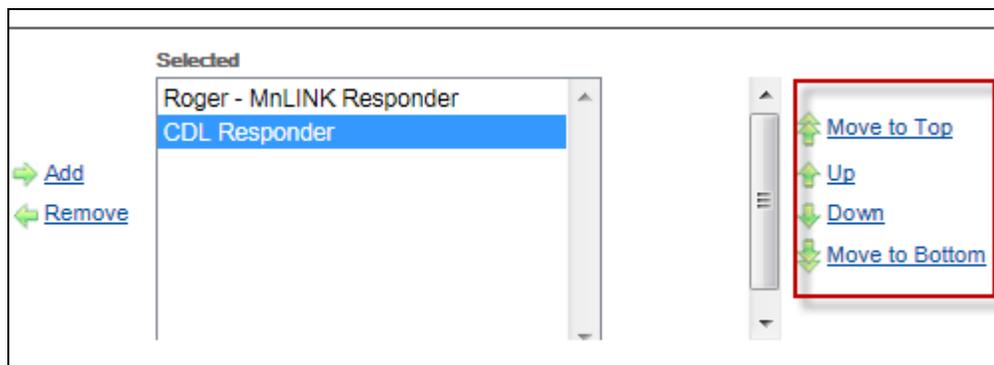
All locations matching your search term will be displayed as **Found**. Select the location or locations you want to add to the rota and click **Add**.



The location is then added to the selected box. It can be removed by using the **Remove** button.



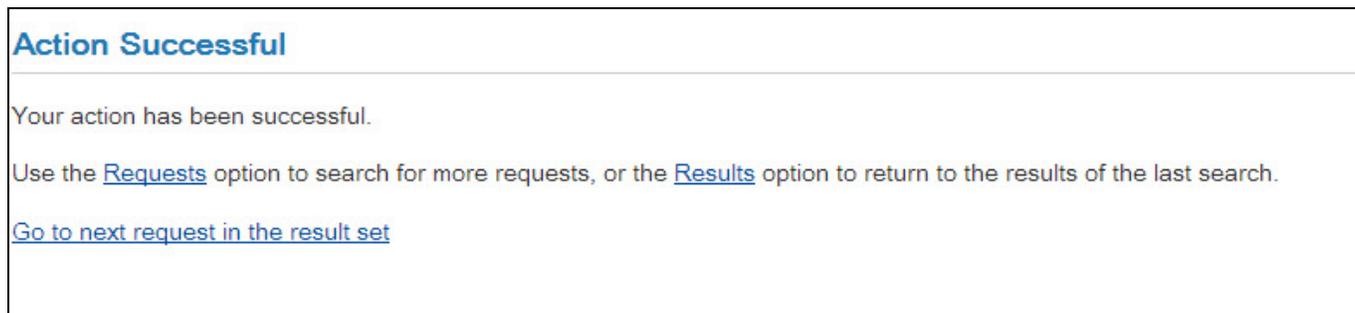
You can also order the locations in the rota by using **Move to Top**, **Up**, **Down** and **Move to Bottom**.



If your request was not automatically processed because the item was found locally and you decide to send the request, remember to remove the location(s) from the rota that represent your local location(s) before authorizing the request.

When the rota is suitable and the request is ready to be sent to a lender, click the **Request** button.

A confirmation screen is displayed showing whether the action was successful.



Your request will now have a status of **Pending** and will be sent to the first responder on the rota.

From the action message, you can click [Go to next request in the results set](#) to continue authorizing requests.

When you encounter a request that should not be authorized, you can Complete it to remove it from your work queue. See section 2.4.7.



2.3.2 Receiving Requested Items

On receipt of an item you should change the status of the request to Received.

You may retrieve the item from an ILL request search if you know the request number, or from the Shipped or Pending section of the Borrower Work Queue. If you have a number of items to receive, it may be advisable to work from the work queue.

Since you have the item in hand, you may not need to view the request details before receiving it. From the request results, you can select the action Received document and click on the Action button.

Our Number / Their Number **	Borrower / Lender **	Item Barcode
<input type="checkbox"/>	20661 / 20662 **	MnLINK Requester / MnLINK Responder
The cat		
Richards, Dorothy Silkstone, Maggitti, Phil ISBN: 086101703X		
Status: Shipped Authorisation: Unread Last Action: Shipped-Indication: 17 Nov 2014 Rota: 1 of 1		
		Received <input type="button" value="Action"/>
		Details Mark as Read Print

When you choose the Received action, you can complete the local due date on the form. The local due date may also default from rules created when your system was configured. You may modify it, if needed. You can also enter a Public note which will be sent to the lender or Private Note for your staff use only.

If you have integrated your circulation system with **NRE/VDX**, enter the barcode the item will have in your circulation system in the 'Local Item Barcode' field.



ILL Request

Action: Received

[Receive](#) [Reset](#)

Receiving from Roger - MnLINK Responder
Our Number 20661
Status Shipped
Title The cat
Author Richards, Dorothy Silkstone;Maggitti, Phil
Service Type 1 Loan

Shipped Service Type

Number of Items

Received Date (e.g. 10 Jun 2009)

Due Date 17 Dec 2014

Local Due Date (e.g. 10 Jun 2009)

Local Item Barcode

Shipped Item 20662

Patron Name Ralph Horton

Requester Max Cost 0.00 USD

Patron Max Cost 0.00

Public Note

Location	Action	Date	Note
From Roger - MnLINK Responder	Send Note-indication	17 Nov 2014 10:39:52	Ralph's Public Note

Private Note

[Receive](#) [Reset](#)



When items have been received they appear in the Received List report, available from the Borrower Work Queue. This report can be inserted into the item and placed on a shelf for the patron. It can also be used to notify the patron by telephone.

Reports	
Received List	2
Returned List	0

The report is in PDF format. It can only be printed once from the Work Queue but can later be printed again if necessary by going to the Reports area of **NRE/VDX** and selecting Batch Reruns or by selecting the report type in the request details.

Patron Name: Ralph Horton	
Phone:	
Email:	
	Pickup Location: MnLINK Requester
Request No.: 20661	Due Date: 17-DEC-2014
Item Barcode: 20662	
Title: The cat	
ISBN/ISSN: 086101703X	

2.3.3 Returning Items to the Supplying Library

Items in the Received section of the Borrower Work Queue are on loan to borrowers at your library and need to have the 'Returned' action taken when they are ready to be returned to the supplying library. This will send a message to the Lending library that the item is being returned.

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20661 / 20662 ** MnLINK Requester / MnLINK Responder ** 20662

The cat

Richards, Dorothy Silkstone;Maggitti, Phil | ISBN: 086101703X

Status: **Received** Authorisation: **Unread** Last Action: **Renew Answer-Yes-Indication:17 Nov 2014** Rota: 1 of 1

Returned



When you choose the Returned action, you will see this screen:

ILL Request

Action: Returned

[Return](#) [Reset](#)

Our Number 20661

Status Received

Title The cat

Author Richards, Dorothy Silkstone;Maggitti, Phil

Return Date  (e.g. 10 Jun 2009)

Returned Via

Insured Amount

Insured Currency

Local Item Barcode 20662

Shipped Item 20662

Public Note

Location	Action	Date	Note
From Roger - MnLINK Responder	Send Note-indication	17 Nov 2014 10:39:52	Ralph's Public Note

Private Note

[Return](#) [Reset](#)

The Return Date defaults to today's date but can be changed if required.



Each item which is returned is added to the Returned List report which can be printed from the Borrower Work Queue in the same way as the Received List described above.

This report can be inserted in the book when returning it to the lending library. The report is in PDF format. It can only be printed once from the Work Queue but can later be printed again if necessary by going to the Reports area of **NRE/VDX** and selecting Batch Reruns or by selecting the report type in the request details.

DO NOT REMOVE SLIP FROM ITEM	
RETURN SLIP	
25-OCT-2012	
Return To:	
Delivery Point:	Responding Library:
CDL Requester ID: CDLQ	CDL Requester ID: CDLQ
Address:	Address:
Phone:	Phone:
<hr/>	
Return From:	
Requesting Library:	
CDL Responder ID: CDLR	
Address:	
Phone:	
Responder Req.4607 No.:	
<hr/>	
Item Information:	
Requester Req.4560 No.:	
Title: The prince.	
Item Barcode:	
Items Shipped:	
<hr/>	
Send to:	
DO NOT REMOVE SLIP FROM ITEM	



2.3.4 Dealing with End of Rota Requests

If the current potential lending library chooses the action Answer Nonsupply, then your request will automatically be forwarded to the next library on the rota. When no library in the rota is able to satisfy the request, you will find the request in the End of Rota section of the Work Queue.

Borrower	
Status	Count
Idle	11
Idle / Check Manual	6
Idle / Auth Manual	6
Pending > 2 weeks	4
Pending	4
End of rota	7
Terminated	0

There are 2 things you can do with End of Rota requests:

- Complete them to remove them from the Work Queue
- Add more locations and send the request on.

To complete the request, perform a Complete action.

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20377 ** MnLINK Requester

The bowling lane without any strikes

Brezenoff, Steven;Calo, Marcos ill. | ISBN: 9781434259790 (library binding);143425979X (library binding);9781434262127 (pbk.);143426212X (pbk.)

Status: **Not Supplied** Authorisation: **Check Manual** Last Action: **REQUEST:14 Nov 2014** Rota: 2 of 2

Complete



You can add a private note if needed and then click the Complete button.

ILL Request

Action: Complete

Complete [Reset](#)

Request Details

Our Number 20377
Status Not Supplied
Title The bowling lane without any strikes
Author Brezenoff, Steven;Calo, Marcos ill.
Patron Name Ralph Horton
Patron Email address rhorton@everestkc.net horton.ralph@gmail.com

Service Details

Service Type 1 Loan

Notes

Private Note

Complete [Reset](#)

To add more locations to a request's rota and 'bring it back to life' after it has reached End of Rota, select the Request action and click the **Action** button.

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20377 ** MnLINK Requester

The bowling lane without any strikes

Brezenoff, Steven;Calo, Marcos ill. | ISBN: 9781434259790 (library binding);143425979X (library binding);9781434262127 (pbk.);143426212X (pbk.)

Status: **Not Supplied** Authorisation: **Check Manual** Last Action: **REQUEST:14 Nov 2014** Rota: 2 of 2

REQUEST **Action** [Details](#) [Mark as Read](#) [Print](#)



You should then go to the Rota Details section of the ILL Request screen and add new locations to the rota. The locations to which the request has already been sent will be shown, but will be faint.

Rota Details

Holdings Found

Available

- OCLC Test BHISO
- ISOAA OCLC TEST - BOTH
- ISOHH OCLC - TEST - BOTH
- ISOSS OCLC - TEST-BOTH
- OCLC Test NDOLP
- OCLC Test NDWAU
- OCLC ISO Test Location - For Over the wall testing**
- OCLC direct to lender - to OCLC test location

Selected

- CDL Broker-Parent**
- Roger - MnLINK Responder

Library symbol or location name: **Search**

After adding more locations, click the **Request** button to send the request to the first location in your new rota.

2.3.5 Cancelling a request

If Configured, The Cancel action should be used *only* to cancel the request with the current responder location and move onto the next location in the rota. If the lender responses with a “Cancel Reply-Yes” the request will move onto the next location in the rota.

Cancel

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20377 / 20663 ** MnLINK Requester / MnLINK Responder

The bowling lane without any strikes

Brezenoff, Steven;Calo, Marcos ill. | ISBN: 9781434259790 (library binding);143425979X (library binding);9781434262127 (pbk.);143426212X (pbk.)

Status: **Pending** Authorisation: **Processed** Last Action: **REQUEST:17 Nov 2014** Rota: 3 of 3

Cancel **Action** [Details](#) [Mark as Read](#) [Print](#)

Cancel Now

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20377 / 20663 ** MnLINK Requester / MnLINK Responder

The bowling lane without any strikes

Brezenoff, Steven;Calo, Marcos ill. | ISBN: 9781434259790 (library binding);143425979X (library binding);9781434262127 (pbk.);143426212X (pbk.)

Status: **Pending** Authorisation: **Processed** Last Action: **REQUEST:17 Nov 2014** Rota: 3 of 3

Cancel Now **Action** [Details](#) [Mark as Read](#) [Print](#)

Cancel now is only available for Laser/Consortial request. This action will cancel the request and not wait for a response from the lender before the request will move onto the next location in the rota.



Use Terminate Request (see below) to cancel the entire request.

Select Cancel/Cancel Now from the list of available actions and click the Action button.

ILL Request

Action: Cancel Now

Action [Reset](#)

Our Number 20377

Status Cancel Pending

Title The bowling lane without any strikes

Author Brezenoff, Steven;Calo, Marcos ill.

Public Note

Location	Action	Date	Note
From Roger - MnLINK Responder	Send Note-indication	06 Nov 2014 09:54:45	testing the note

Private Note

Action [Reset](#)

You may send a message to the current responder with information about the cancellation. When you are ready to cancel the transaction with the current responder, click on the Action button.

If the lending library is a **NRE/VDX** or ISO-ILL responder, the request will move from a status of Pending to one of Cancel Pending, waiting for the lending library to acknowledge the cancellation.

If the responding library is a generic script or email responder, the request will be cancelled immediately. The request will move on to the next location in the rota and become Pending. If there are no more locations on the rota, the request will be in the End of Rota queue and can be completed.

2.3.6 Terminating a request

You can terminate a request if the request has not been received. Terminating a request cancels the request with the current responder and does not forward the request the next location on the rota. If you have enabled end users to cancel requests on Navigator Patron Discovery/ZPORTAL, this function actually terminates the request. You use this action when the patron does not want the item anymore.

Retrieve the item to be terminated from request searches or work queue and display the brief details. Select the Terminate Request action and click on the Action button.

Our Number / Their Number ** Borrower / Lender ** Item Barcode
<input type="checkbox"/> 20349 / 20664 ** MnLINK Requester / MnLINK Responder
Mr. Wuffles
Berneis, Susie;Wiesner, David;Motion picture adaptation of: Wiesner, David Mr. Wuffles;Dreamscape Media. ISBN: 9780977709861;0977709868
Status: Pending Authorisation: Processed Last Action: REQUEST:17 Nov 2014 Rota: 1 of 1
Terminate Request Action Details Mark as Read Print

The Terminate Request screen will display, allowing you to add a private note about the cancellation.

ILL Request
Action: Terminate Request
Terminate Reset
Our Number 20349
Status Pending
Title Mr. Wuffles
Author Berneis, Susie;Wiesner, David;Motion picture adaptation of: Wiesner, David Mr. Wuffles;Dreamscape Media.
Click the Terminate button to terminate this request
Private Note <input type="text"/>
Terminate Reset

Once you click Terminate, a cancellation message will be sent to the current lender. Depending on the protocol being used to correspond with the lender, you may have to wait for confirmation of the cancellation before the request is terminated.



2.3.7 Completing a request

Requests which will not be progressed any further can be removed from the Borrower Work Queue by performing the **Complete** action. Completing requests because they have reached the end of the rota has been explained in section 3.3.4. There are other reasons that requests can be completed, such as Idle requests that you have decided should not be sent to any responder because it is a duplicate or because it can be supplied locally. You can complete any request that you are certain has reached the end of its lifecycle.



You should not complete requests if they are at a status of Pending as the lending library may still supply the item – requests should only be completed if you are sure no further action will be taken on them.

Complete requests by using the Complete action from the list of available actions.

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20349 / 20664 ** MnLINK Requester / MnLINK Responder

Mr. Wuffles

Berneis, Susie;Wiesner, David;Motion picture adaptation of: Wiesner, David Mr. Wuffles;Dreamscape Media. | ISBN: 9780977709861;0977709868

Status: **Pending** Authorisation: **Processed** Last Action: **REQUEST:17 Nov 2014** Rota: **1 of 1**



When the Complete screen displays, add a private note if needed and press the Complete button.

ILL Request

Action: Complete

[Complete](#) [Reset](#)

Request Details

Our Number	20349
Their Number	20664
Status	Pending
Title	Mr. Wuffles
Author	Berneis, Susie;Wiesner, David;Motion picture adaptation of: Wiesner, David Mr. Wuffles;Dreamscape Media.
Patron Name	Patron MnLINK
Patron Email address	hortonr@oclc.org

Service Details

Service Type 1	Loan
-----------------------	------

Notes

Private Note	<div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>
---------------------	--

[Complete](#) [Reset](#)



2.3.8 Searching for Complete requests

Completed requests no longer appear in the Work queue, but you can search for them in the Advanced ILL request Search.

If you are searching for requests and want to include completed requests, you can click on the Include completed requests option.

Requests by ILL number will always display the request, active or completed.

ILL Request Search

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

Your Library's Role

Lender
 Borrower
 Both

Display sent messages only
 Display Terminated requests
 Display Not Supplied requests
 Display circ error requests only
 Search Bureau

Do not include Completed requests
 Include Completed requests
 Completed requests only

Request Status

Status Awaiting Automated Acceptance
Borrower Received
Borrower Renew Pending
Borrower Returned
Borrower Returned: Lender Overdue

Authorisation Status [Dropdown]
Last Action [Dropdown]
Any Action [Dropdown]
Service Level [Dropdown]
Service Type 1 [Dropdown]
Log Message Type [Dropdown]
Circ Error Type [Dropdown]
Format Article Printed
Print Journal
Book
Part of Book
Ejournal

Other fields

ILL Numbers [Dropdown] [Text Box] Or [Dropdown]
ILL Numbers [Dropdown] [Text Box] Or [Dropdown]
ILL Numbers [Dropdown] [Text Box]

Sort by ILL Number [Dropdown] descending ascending
Sort by [Dropdown] descending ascending
Format Standard Print
Records per page 10 [Dropdown]

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



2.3.9 Renewing a requested item

If you want to renew the loan on a requested item which you have received in **NRE/VDX** you should retrieve the request and perform the Renew action on it

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20661 / 20662 ** MnLINK Requester / MnLINK Responder ** 20662

The cat
Richards, Dorothy Silkstone;Maggitti, Phil | ISBN: 086101703X
Status: **Received** Authorisation: **Processed** Last Action: **Received:17 Nov 2014** Rota: 1 of 1

Renew [Action](#) [Details](#) [Mark as Read](#) [Print](#)

You will be presented with a screen where you can enter the new desired due date.

ILL Request

Action: Renew

[Renew](#) [Reset](#)

Our Number 20661
Status Received
Title The cat
Author Richards, Dorothy Silkstone;Maggitti, Phil
Due Date 17 Dec 2014

Desired Due Date (e.g. 10 Jun 2009)

Local Item Barcode 20662
Shipped Item 20662
Public Note

Location	Action	Date	Note
From Roger - MnLINK Responder	Send Note-indication	17 Nov 2014 10:39:52	Ralph's Public Note

Private Note

[Renew](#) [Reset](#)



The request will appear in the Renew Pending section of the Borrower Work Queue

If the lender agrees to the renewal, the request will return to the Received section of the Borrower Work Queue with a new Due Date.



2.3.10 Automatic expiry of requests

When a request is sent to a potential lender, an expiry date will be sent. If a request you have sent to a library has not been updated after a specific number of days, it will automatically expire on the lender's side and sent to the next library in your rota (or will go to End of Rota if there are no more lenders in the rota). The expiration function is a lender-side function.

2.3.11 Informed Shipped/Informed Not Supplied

If a lending library which does not use **NRE/VDX** or a compatible system informs you by email or phone that they are supplying a request, you need to update the record in **NRE/VDX** to stop the request from expiring and moving on in the rota.

Access the correct record from the Work Queue or by searching for it.

Select "**Informed Shipped**" then click the **Action** button.

Similarly, if a lending library which does not use **NRE/VDX** or a compatible system has informed you that they are not supplying the item, you should take the **Informed Not Supplied** action on the request. This will move the request on to the next location in its rota.

2.3.12 How to send a Note

You may sometimes wish to send a message to the lending library, without updating the status of the request.

To do this, choose the Send Public Note action for the request:

The screenshot shows a request record in the NRE/VDX system. At the top, it displays 'Our Number / Their Number ** Borrower / Lender ** Item Barcode'. Below this, there is a checkbox and the text '20349 / 20664 ** MnLINK Requester / MnLINK Responder'. The borrower's name is 'Mr. Wuffles'. Below the name, it says 'Berneis, Susie; Wiesner, David; Motion picture adaptation of: Wiesner, David Mr. Wuffles; Dreamscape Media. | ISBN: 9780977709861; 0977709868'. The status is 'Pending', authorisation is 'Processed', last action is 'REQUEST: 17 Nov 2014', and the rota is '1 of 1'. At the bottom right, there is a dropdown menu with 'Send Public Note' selected and an 'Action' button next to it. Other buttons for 'Details', 'Mark as Read', and 'Print' are also visible.

Type your note in the Public Note box, and click **Send**.

ILL Request

Action: Send Public Note

[Reset](#)

Our Number 20349

Status Pending

Title Mr. Wuffles

Author Berneis, Susie;Wiesner, David;Motion picture adaptation of: Wiesner, David Mr. Wuffles;Dreamscape Media.

Public Note

The other side will see this note

Private Note

They will not see this note

[Reset](#)

The responding library will see the message appear in their Lender Work Queue.

The same procedure can be used to add a private note to the request by selecting the **Add Private Note** action.

You may also need to send information to your patron concerning the request. This is done via an email message to the email address in the request.

Search for and display the appropriate request. Select the **Send User Alert** action and click the Action button.

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20349 / 20664 ** MnLINK Requester / MnLINK Responder

Mr. Wuffles

Berneis, Susie;Wiesner, David;Motion picture adaptation of: Wiesner, David Mr. Wuffles;Dreamscape Media. | ISBN: 9780977709861;0977709868

Status: **Pending** Authorisation: **Processed** Last Action: **REQUEST:17 Nov 2014** Rota: 1 of 1

[Details](#)



You will be presented with a screen containing request details and allowing you to enter the patron note. When you have completed the note, click on the Send button.

ILL Request

Action: Send User Alert

[Send](#) [Reset](#)

Request Details

Our Number 20349
Their Number 20664
Status Pending
Title Mr. Wuffles
Author Berneis, Susie;Wiesner, David;Motion picture adaptation of: Wiesner, David Mr. Wuffles;Dreamscape Media.
Patron Name Patron MnLINK
Patron Email address hortonr@oclc.org

Service Details

Service Type 1 Loan

Notes

Private Note

Patron Note

[Send](#) [Reset](#)



3 MANAGING REQUESTS AS A LENDER

3.1 THE LENDER WORK QUEUE

The Lender Work Queue is accessed in the same way as the Borrower Work Queue, either from the **Work Queue** link at the top of the screen when in the requests domain, or by clicking **Work Queue** from the left hand menu bar.

Lender	
Status	Count
New Requests	1
New Requests Expiring Today	0
Will Supply	0
Conditional	0
Cancel Requested	0
New Notes	0
Shipped	19
Renewal Requested	0
Overdue Today	2
Overdue > 4 weeks	13
Recalled	1
Returned	1
Reports	
Pick List	1
Shipping List	8



3.2 *LENDER WORK QUEUE STATUSES*

The Lender Work Queue should be checked as often as possible for items that need to be acted on. In the Lender work queue, you can easily find requests in the following statuses.

New Requests – Requests for items held by your library.

New Requests Expiring Today - Requests for items held by your library which are set to expire at the end of the day. You will need to respond to these requests either with a non-supply, shipped or will supply action. Otherwise, the request will move to the next lender.

Will Supply - Requests for which you have sent a notice alerting the borrower that you will supply the item in the near future.

Conditional - You will not lend the item to the borrower unless he agrees to your stipulations on its use. You have sent the borrowing library a Conditional message.

Cancel Requested - Requests which the borrower wants to cancel. You need to let the borrower know if the request is cancelled or if the item has already been shipped and cannot be cancelled.

New Notes - You should also check any **New Notes** which are flagged in the Lender Work Queue. A request will be counted in New Notes when the borrower has sent a note that does not update the request status.

Shipped – Requests you have sent to borrowers.

Renewal Requested –items you have lent to other libraries and which the borrower wants to renew. You should update the request to let the borrower know whether you consent to renewal of the loan.

Overdue Today – Requests which are currently overdue. You may perform the Overdue action to send an overdue notice to the borrower.

Overdue > 4 weeks – Request which have not been returned 4 weeks or more after you have sent the overdue notice to the borrower.

Recalled – Requests which you have recalled from the borrower, asking that it be returned earlier than the due date.

Returned – Items which have been returned from the borrower. Requests in this category are candidates for the Check in action.

Circulation Queue – (if configured) **NRE/VDX** is not able to connect to the requesting system to reply to the request. NRE/VDX will keep retrying the system.



Lender Request Management – workflow tasks

3.2.1 New Requests

New requests from borrowing libraries will appear in the New Requests section of the Lender Work Queue. You should take action on them as quickly as possible.

Lender	
Status	Count
New Requests	7
New Requests Expiring Today	0

3.2.2 Pick List

New requests also appear in the Pick List report, which you can print out to aid with checking for items in your Library Management System or on shelves.

Reports	
Pick List	8
Shipping List	0

The number of requests in the Pick List report will increment until the report is printed by clicking on the number in the Lender Work Queue. After the report is printed, the number of items in the report will reset to 0 and begin to increment again.



The report is in PDF format and displays one request per page.

Request No.: 12871	Status: In Process
Call Number:	
Expiration Date:	
Title: From eternity to here ; the quest for the ultimate theory of time	
Format: Book	
Author: Carroll, Sean M 1966-	
Edition:	
Publisher Info: Dutton ; New York	
Publication Date: c2010.	
Description:	
ISBN/ISSN: 0525951334;9780525951339	
PublisherLCN: 2009023828	
Number:	
Media Type: Printed	
Article Title:	
Article Author:	
Volume/Issue:	Pages:
Article Date:	
Copyright	
Compliance:	
Request Notes:	
AdditionalLCN: 2009023828	
Numbers:	
Need By:	
Ship To: CDL Responder	



3.2.3 Shipping an item

If you have a requested item in stock and you are willing to lend it to the borrowing library, you will notify the requester through **NRE/VDX** that you are sending the item. This will send a message to the requesting library that you are shipping the item, and will prevent the request from expiring and moving on to the next potential lender in the rota.

Select the Shipped action for the request and click the **Action** button.

The screenshot shows a web interface for managing requests. At the top, there is a header: "Our Number / Their Number ** Borrower / Lender ** Item Barcode". Below this, a request is listed with a checkbox: "20662 / 20661 ** MnLINK Requester / MnLINK Responder". The title of the request is "The cat". Below the title, the author and ISBN are listed: "Richards, Dorothy Silkstone, Maggitti, Phil | ISBN: 086101703X". The status is "In Process", the authorisation is "Processed", and the last action is "Send Public Note: 17 Nov 2014". To the right of the status information, there is a dropdown menu currently set to "Shipped" and a blue "Action" button. To the right of the "Action" button are three icons: "Details", "Mark as Read", and "Print".

After choosing the Shipped action, you are presented with the Shipped screen, where you can enter the loan's due date, alter the Service Type, Payment Type, or Delivery Method, or Cost, or add a note to the request. If you have integrated circulation with NRE/VDX, you must enter the barcode of the item being shipped in the Shipped Item field.

The Delivery Locator allows you to specify the delivery address for electronic documents when it is different from that configured for the borrowing location.



Once you have added appropriate shipping details, click on the Ship button. (Shown in two parts)

ILL Request

Action: Shipped

[Reset](#)

Request Details

Our Number 20662
Their Number 20661
Status In Process
Title The cat
Author Richards, Dorothy Silkstone;Maggitti, Phil
Public Note

Location	Action	Date	Note
To Doger - MnLINK Requester	Send Public Note	17 Nov 2014 10:39:53	Ralph's Public Note

Private Note

Our Local Number

Service Details

Requested Service Type Loan
Shipped Service Type Loan

Ship Date (e.g. 10 Jun 2009)
Due Date (e.g. 10 Jun 2009)
Media Type
Delivery Method
E Delivery Params
Delivery Locator
Conditions
Shipped Item
Number of Items



Copyright Info

Charge Details

Borrower Doger - MnLINK Requester

Our Charges

Base Cost Ex Tax	<input type="text"/>	Shipped Cost Ex Tax	
Tax Code Type	<input type="text"/>	Tax Amount	

[Calculate New Cost](#) [Reset Default Cost](#)

Ship Cost

Currency

[Ship](#) [Reset](#)

3.2.4 Informing the Borrowing Library an Item Will be Supplied

If you are willing to supply an item, but cannot ship it immediately, for example if the item is held at a branch library, you should select the Answer Will Supply action for the request.

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20662 / 20661 ** MnLINK Requester / MnLINK Responder

The cat

Richards, Dorothy Silkstone;Maggitti, Phil | ISBN: 086101703X

Status: **In Process** Authorisation: **Processed** Last Action: **Send Public Note: 17 Nov 2014**

[Action](#) [Details](#) [Mark as Read](#) [Print](#)

On the next screen you can enter a reason why you are not supplying immediately from a drop-down list, and add more information in a note, if desired.



ILL Request

Action: Answer Will Supply

[Will Supply](#) [Reset](#)

Our Number 20662

Status In Process

Title The cat

Author Richards, Dorothy Silkstone;Maggitti, Phil

Reason

Answer Date  (e.g. 10 Jun 2009)

Public Note

Location	Action	Date	Note
To Doger - MnLINK Requester	Send Public Note	17 Nov 2014 10:39:53	Ralph's Public Note

Private Note

[Will Supply](#) [Reset](#)

NRE/VDX can be configured to automatically search your catalog and respond with the Will Supply message if the item is located in your catalog and the availability indicates that the item is on the shelf.

3.2.5 Informing the Borrowing Library an Item Will Not be Supplied

If you are unable to supply a requested item, you should inform the borrowing library of this. If you do not take any action, the request will expire automatically and disappear from your Lender Work Queue after a defined number of days.

Select the action Answer Nonsupply for the request and click the **Action** button.



Our Number / Their Number ** Borrower / Lender ** Item Barcode

20662 / 20661 ** MnLINK Requester / MnLINK Responder

The cat

Richards, Dorothy Silkstone;Maggitti, Phil | ISBN: 086101703X

Status: **In Process** Authorisation: **Processed** Last Action: **Send Public Note: 17 Nov 2014**

Answer Nonsupply [Action](#) [Details](#) [Mark as Read](#) [Print](#)

You are presented with a screen where you can provide the reason you are unable to supply the requested item, and also enter a note if you need to provide more information.

ILL Request

Action: Answer Nonsupply

Not Supplied [Reset](#)

Our Number 20662

Status In Process

Title The cat

Author Richards, Dorothy Silkstone;Maggitti, Phil

Reason

Public Note

Location	Action	Date	Note
To Doger - MnLINK Requester	Send Public Note	17 Nov 2014 10:39:53	Ralph's Public Note

Private Note

Not Supplied [Reset](#)

After you take this action, the request will move on to the next location on the borrowing library's rota. The request will automatically complete and be removed from your work queue.



NRE/VDX can be configured to automatically search your catalog and respond with the Non Supply message if the item is not located in your catalog or if the item is located in your catalog and the availability indicates that the item is not on the shelf.

3.2.6 How to Respond to a Renewal Request

If you have any items in the Renewal Requested section of the Lender Work Queue, you should update them to let the borrowing library know whether or not you agree to renew the item by taking either the Renew Yes or Renew No Action

Renewal Requested	1
Overdue Today	0
Overdue > 4 weeks	0

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20662 / 20661 ** MnLINK Requester / MnLINK Responder ** 20662

The cat
Richards, Dorothy Silkstone;Maggitti, Phil | ISBN: 086101703X
Status: **Renew / Pending** Authorisation: **Unread** Last Action: **Renew-Indication:17 Nov 2014**

Renew Answer-Yes [Action](#) [Details](#) [Mark as Read](#) [Print](#)

If you take the Renew Yes Action, you should let the borrower know the new Due Date for the loan

ILL Request

Action: Renew Answer-Yes

[Reply](#) [Reset](#)

Our Number 20662
Status Renew / Pending
Title The cat
Author Richards, Dorothy Silkstone;Maggitti, Phil
Desired Due Date 30 Jan 2015
Due Date (e.g. 10 Jun 2009)
Shipped Item 20662
Public Note

Location	Action	Date	Note
To Doger - MnLINK Requester	Send Public Note	17 Nov 2014 10:39:53	Ralph's Public Note

Private Note

[Reply](#) [Reset](#)



3.2.7 How to Send an Overdue Notice to the Borrower

When the due date for an item has been reached, the work queue will indicate that the item is overdue.

Renewal Requested	0
Overdue Today	1
Overdue > 4 weeks	0
Recalled	0
Returned	0

If the item has been received by the borrowing library, you can send an Overdue message to the borrower. This is done by selecting the Overdue action.

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20491 / 20490 ** MnLINK Requester / MnLINK Responder

Street justice - a Smokey Dalton novel

Nelscott, Kris author. | ISBN: 9780615935140 (pbk.);0615935141 (pbk.)

Status: **Shipped** Authorisation: **Unread** Last Action: **Received-Indication:23 Jul 2014**

Overdue

The Overdue screen will display. You may add a note if needed and then click on the Overdue button.



ILL Request

Action: Overdue

Overdue [Reset](#)

Our Number 20491

Status Shipped

Title Street justice

Subtitle a Smokey Dalton novel

Author Nelscott, Kris author.

Due Date  (e.g. 10 Jun 2009)

Public Note

Location	Action	Date	Note
From Doger - MnLINK Requester	Received-Indication	23 Jul 2014 13:54:13	Received public note
To Doger - MnLINK Requester	Shipped	23 Jul 2014 13:51:12	shipping public note

Private Note

Action	Date	Note
Shipped	23 Jul 2014 13:51:12	Shipping Private note

Overdue [Reset](#)

The borrower will receive the overdue message and a user notification may be sent to the patron, if NRE/VDX has been configured to do so.

3.2.8 How to Recall an item

If you have lent an item through interlibrary loan but need it returned before the due date, you may recall it. Search for the item that needs to be recalled and select the Recall action.



20489 / 20488 ** MnLINK Requester / MnLINK Responder

Viviane

Deck, Julia | ISBN: 9781595589644 (hardback);1595589643 (hardback)

Status: **Shipped** Authorisation: **Unread** Last Action: **Received-Indication:23 Jul 2014**

Recall Action Details Mark as Read Print

The Recall action screen will display. You may send a message about the recall to the lender. Once you have added the necessary information, click on the Recall button.

ILL Request

Action: Recall

Recall Reset

Our Number 20489

Status Shipped

Title Viviane

Author Deck, Julia

Public Note

Please return for author visit

Private Note

Recall Reset



3.2.9 How to Respond to a Cancel Request

If a borrowing library wishes to cancel a request for which you are the current potential lender, you need to inform the borrowing library whether the request can be cancelled. It is important that you do take action on any such requests, as the request will not otherwise move on in the rota.

The request will be in the **Cancel Requested** section of the Lender Work Queue.

You should take the appropriate action on the request, usually Cancel Yes.

The screenshot displays a web interface for managing requests. At the top, it says "Our Number / Their Number ** Borrower / Lender ** Item Barcode". Below this, a checkbox is selected next to the number "20663 / 20377 ** MnLINK Requester / MnLINK Responder". The title of the request is "The bowling lane without any strikes". Below the title, the author information is listed: "Brezenoff, Steven;Calo, Marcos ill. | ISBN: 9781434259790 (library binding);143425979X (library binding);9781434262127 (pbk.);143426212X (pbk.)". The status is "Cancel Pending", authorisation is "Unread", and the last action is "Cancel-Indication:17 Nov 2014". To the right of the request details are several action buttons: "Action", "Details", "Mark as Read", and "Print". A dropdown menu is open over the "Action" button, showing options: "Cancel Reply-Yes", "Cancel Reply-No", "Add Private Note", "Cancel Now", "Complete", "Local Change Request Details", and "Send Public Note". The "Cancel Reply-Yes" option is highlighted. Below the request details, there is a yellow bar with the text "End of Results". At the bottom left, it says "Number of Results: 1".

When you reply 'Cancel Reply – Yes', the request will be completed and will no longer appear in your work queue.



3.2.10 The Checked In Action

When an item which you have lent to a borrowing library is returned to you, you will perform the Checked In action to finish the request in **NRE/VDX**. This will send a message to the borrowing library that you have received the item back. The request will automatically be completed and removed from the Work Queue since the request has reached the end of its life cycle. If the borrower is a **NRE/VDX** user, the request will also complete on the borrowing side when you check the item in.

Retrieve the item and select the Checked In action.

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20662 / 20661 ** MnLINK Requester / MnLINK Responder ** 20662

The cat

Richards, Dorothy Silkstone;Maggitti, Phil | ISBN: 086101703X

Status: **Shipped** | Authorisation: **Unread** | Last Action: **Returned-Indication:17 Nov 2014**

Checked In

The check in date will default to the current date. It can be changed if needed.

ILL Request

Action: Checked In

[Reset](#)

Our Number 20662

Status Shipped

Title The cat

Author Richards, Dorothy Silkstone;Maggitti, Phil

Check In Date (e.g. 10 Jun 2009)

Shipped Item 20662

Public Note

Location	Action	Date	Note
To Doger - MnLINK Requester	Send Public Note	17 Nov 2014 10:39:53	Ralph's Public Note

Private Note

[Reset](#)



3.2.11 How to send Notes

You may sometimes wish to send a message to the borrowing library without updating the status of the request. The workflow is the same as detailed in Chapter 2 for borrowing libraries.

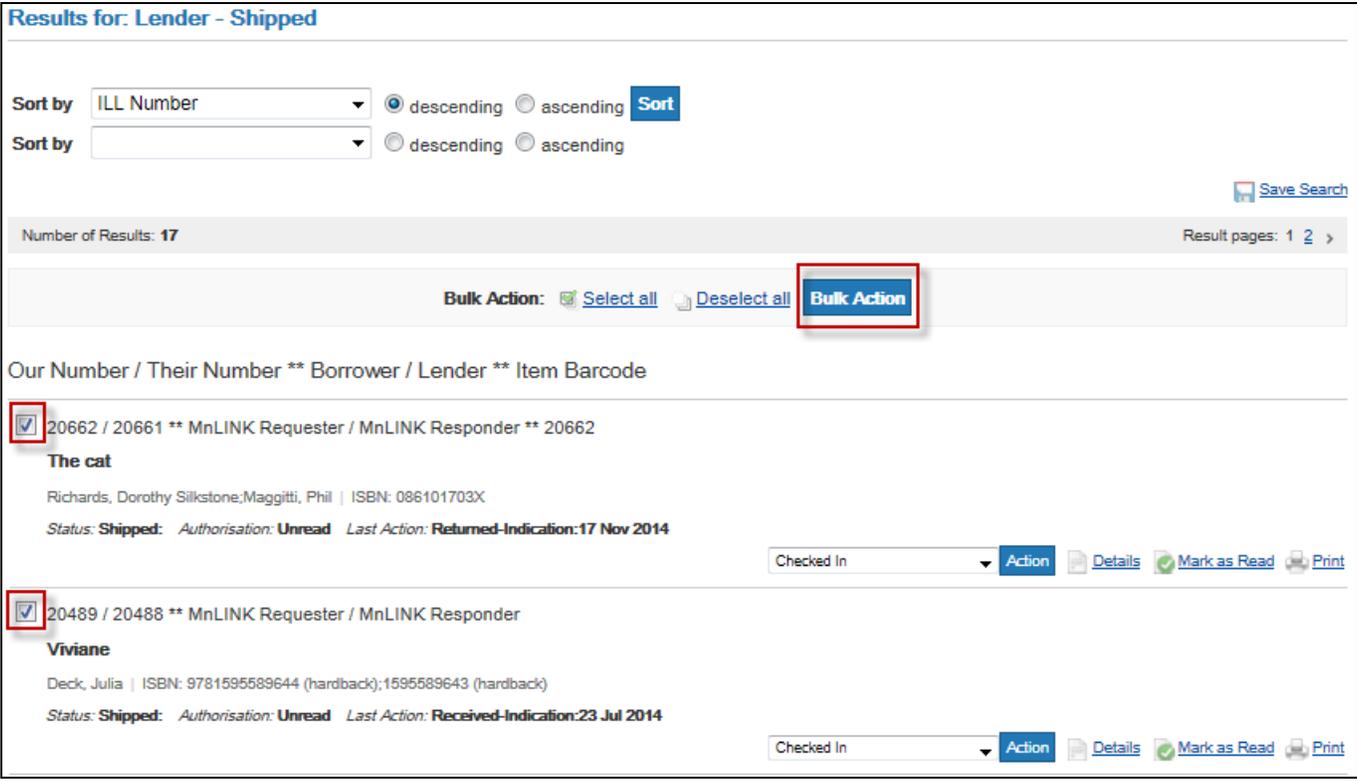
4 BULK ACTION

4.1 INTRODUCTION

You may sometimes need to take the same action on a number of requests. The Bulk Action feature allows you to update several requests with one action.

There are two ways to initiate a bulk action.

You can take the action on all or selected records in a results list retrieved either from the Work Queue or from a search.



Results for: Lender - Shipped

Sort by: ILL Number descending ascending **Sort**

Sort by: descending ascending

Number of Results: 17 Result pages: 1 2 >

Bulk Action: [Select all](#) [Deselect all](#) **Bulk Action**

Our Number / Their Number ** Borrower / Lender ** Item Barcode

20662 / 20661 ** MnLINK Requester / MnLINK Responder ** 20662

The cat
Richards, Dorothy Silkstone, Maggitti, Phil | ISBN: 086101703X
Status: **Shipped** Authorisation: **Unread** Last Action: **Returned-Indication: 17 Nov 2014**

Checked In **Action**

20489 / 20488 ** MnLINK Requester / MnLINK Responder

Viviane
Deck, Julia | ISBN: 9781595589644 (hardback); 1595589643 (hardback)
Status: **Shipped** Authorisation: **Unread** Last Action: **Received-Indication: 23 Jul 2014**

Checked In **Action**

Also, you can click the **Bulk Action** link from the top of the page and type the request numbers of the requests you wish to update in the box provided. You may have reports with barcoded request number which you can scan into the Bulk Action box.



[Standard](#) | [Advanced](#) | [Results](#) | **[Bulk Action](#)** | [Create](#) | [Batch Update](#) | [Saved Searches](#) | [Work Queue](#) | [Print](#)

Select either an “Action” or an “Authorisation Status” not both.

Bulk Action / Authorisation

Enter ILL numbers, separated by blanks or commas

ILL Numbers

Select either an action, authorisation status or process status for all the requests

Action

Authorisation Status

[Action](#) [Reset Form](#)

OR

4.2

BULK ACTION AS A BORROWER

There are a number of potential bulk actions you may wish to perform as a borrowing library, e.g. you may wish to authorize all the entries in the **Idle**, **Auth Manual** section of the Work Queue, or you may wish to bulk **Complete** or **Return** a number of items.

4.2.1 Bulk authorization

To bulk authorize all requests from the **Idle**, **Auth Manual** section of the Work Queue:



Results for: Borrower - Idle / Auth Manual

Sort by ILL Number descending ascending [Sort](#)

Sort by descending ascending

[Save Search](#)

Number of Results: 2

Bulk Action: [Select all](#) [Deselect all](#) [Bulk Action](#)

Our Number / Their Number ** Borrower / Lender ** Item Barcode

<input checked="" type="checkbox"/>	20665 ** MnLINK Requester
	Dorothy must die
	Paige, D. M ISBN: 0062280678;9780062280671
	Status: Idle Authorisation: For Manual Authorisation Last Action: REQUEST Rota: 1 of 1
	REQUEST Action Details Mark as Read Print
<input checked="" type="checkbox"/>	20348 ** MnLINK Requester
	Cat
	Sheen, Martin;Bloom, George Arthur;Meehl, Brian;Butt, Bill;Maxwell, Gavin (Director);DK Publishing, Inc. ISBN: 9780756662981;0756662982
	Notes: Medium: [videorecording]
	Status: Idle Authorisation: AutoMediated AuthManual Last Action: REQUEST Rota: 1 of 1
	REQUEST Action Details Mark as Read Print

Click the Bulk Action **Select All** button, then the **Bulk Action** button. (If you want to authorize some but not all of the requests in the list, you can select them by ticking their individual check boxes).

You are presented with the Bulk Action/Authorization screen where you can decide which action or authorization status to apply to all the requests selected. (You can also add more requests to take the same action on, if you know their request numbers).

In this example, you will want to choose the Authorization Status of Authorized for all the requests, and then click the **Action** button.



Bulk Action / Authorisation

Enter ILL numbers, separated by blanks or commas

ILL Numbers

Select either an action, authorisation status or process status for all the requests

Action

Authorisation Status

[Reset Form](#)

The system informs you whether the bulk action was successful or not for each request.

Bulk Action/Authorisation Report
Successful
20348 20665

4.2.2 Bulk Receiving

If you know the ILL Numbers for your requests, you can receive a number of them as a batch by selecting the **Bulk Action** option from the links at the top of the screen.

You are presented with the Bulk Action/Authorization screen, where you can enter the ILL Numbers of the requests you want to receive, then select Received document from the Action drop-down and click the **Action** button.

Bulk Action / Authorisation

Enter ILL numbers, separated by blanks or commas

ILL Numbers

Select either an action, authorisation status or process status for all the requests

Action

Authorisation Status

Action [Reset Form](#)

 If you have integrated circulation with **NRE/VDX**, you should not use Bulk Action to Receive items. Each request must be treated individually so that the appropriate barcode can be entered.



4.3 *BULK ACTION AS A LENDER*

As a responding library you may wish to set the status of a batch of requests to Shipped, or Not Supplied.

The method of selecting requests and the action to perform is the same as that for the borrowing functions.

Remember that any data – notes, due dates, etc that you add to the response will apply to all the selected requests.

5 USER DATA

5.1 USER RECORDS

You have been given a username (barcode) and password for **NRE/VDX** by OCLC. You may wish to change your password to something you find easier to remember.

5.2 SEARCHING FOR YOUR USER RECORD

Click the **User** button in the left-hand menu bar to display the User Search screen:

User Search

Search

for

Match Exact Any part First part Last part

Search Bureau

[Reset](#)

Enter your Username (barcode).

Select the appropriate radio button from the **Match** menu:

Exact	Retrieves records matching your search terms exactly, but is not case sensitive.
Any part	Retrieves matches including your search term in any part of the string.
First part	Retrieves matches including your search term at the beginning of the string.
Last part	Retrieves matches including your search term at the end of the string.



If your system requires a barcode prefix you will need to include it when searching and when entering a new patron.



Click on the **Search**. Your user record will be displayed.

User Details	
User ID	458
Barcode	TESTPATRON
First Name	Test
Surname	Patron
E-Mail	Patron@domain.com
Category	Standard
Joining Date	17 Nov 2014
Location	Doger - MnLINK Requester
Banned in VDX	No
Has Presigned Copyright	No
Default Pickup Location	Doger - MnLINK Requester
 Edit	



5.3 CHANGING YOUR PASSWORD

You can change your password by clicking the **Edit** button. The following screen will display:

User Details

[New Address](#)

User ID 458

Barcode TESTPATRON

Password Update Password

Confirm Password

Alternative Barcode

First Name Test

Surname Patron

E-Mail Patron@domain.com

Category Standard

Join Date 17 Nov 2014 (e.g. 1 Sep 2003)

Expiry Date

Location Doger - MnLINK Requester

Banned In VDX No

Has Presigned Copyright No

Default Pickup Location

Admin Home Action

End User Home Action

Note/Stat 1

Note/Stat 2

Note/Stat 3

Note/Stat 4

Note/Stat 5

Note/Stat 6

Note/Stat 7

Note/Stat 8

Note/Stat 9

Note/Stat 10



Enter your new password in the Password and Confirm Password boxes. Put a tick in the Update Password box.

You may also update other fields in the user record as appropriate

When you have updated the user record, click **Save**.

5.4 *CREATING NEW USERS*

If you do not authenticate users from your library management system, you can create them in the Users section of NRE/VDX, if needed.

From the Users menu, select Create.



You can then enter the user information you need for request management. **NRE/VDX** requires a barcode, surname, location and category. Addresses can be added once the user record is saved.

User Details

Save  [Cancel](#)

 [New Address](#)

User ID	458
Barcode	TESTPATRON
Password	<input type="password"/> <input type="checkbox"/> Update Password
Confirm Password	<input type="password"/>
Alternative Barcode	<input type="text"/>
First Name	<input type="text" value="Test"/>
Surname	<input type="text" value="Patron"/>
E-Mail	<input type="text" value="Patron@domain.com"/>
Category	Standard <input type="text"/>
Join Date	<input type="text" value="17 Nov 2014"/> (e.g. 1 Sep 2003)
Expiry Date	
Location	Doger - MnLINK Requester <input type="text"/>
Banned In VDX	No <input type="text"/>
Has Presigned Copyright	No <input type="text"/>
Default Pickup Location	<input type="text"/>
Admin Home Action	<input type="text"/>
End User Home Action	<input type="text"/>
Note/Stat 1	<input type="text"/>
Note/Stat 2	<input type="text"/>
Note/Stat 3	<input type="text"/>
Note/Stat 4	<input type="text"/>
Note/Stat 5	<input type="text"/>
Note/Stat 6	<input type="text"/>
Note/Stat 7	<input type="text"/>
Note/Stat 8	<input type="text"/>
Note/Stat 9	<input type="text"/>
Note/Stat 10	<input type="text"/>

Save  [Cancel](#)



5.5 HOME PAGE

Under the User details, a staff user may set the default home page for an admin user or an end user.

Has Presigned Copyright	No
Default Pickup Location	
Admin Home Action	Request Work Queue
End User Home Action	
Note/Stat 1	Advanced Request Search
Note/Stat 2	Advanced Z3950 Search
Note/Stat 3	Location Search
Note/Stat 4	Login Page
Note/Stat 5	Request Search
Note/Stat 6	Request Work Queue
	User Search
	Z3950 Search

The Admin Home Action field allows a staff user to personalize his interaction in NRE/VDX by selecting the screen that will display after Log-in.

When creating a record for an end user, the staff user also may also select the screen that will display in ZPORTAL after login by selecting an item from the End User Home Action drop down menu.

Use these fields only if you want to a screen to display after login that is different from the one that currently displays after login in NRE/VDX and ZPORTAL.

6 LOCATION DATA

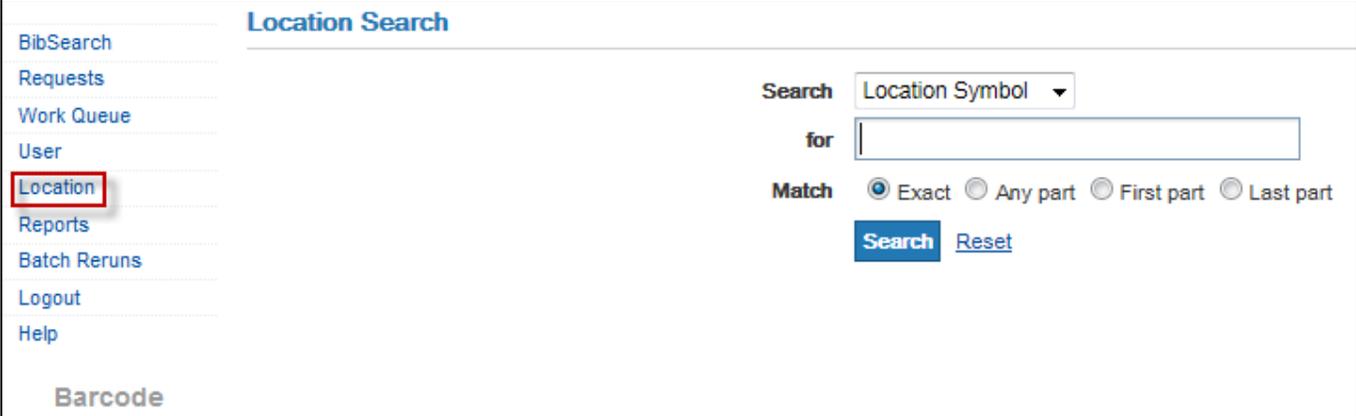
6.1 OVERVIEW

You can use the Locations feature in **NRE/VDX** to find contact information for other libraries, or to temporarily suspend your own library as a lender in **NRE/VDX**.

Any site that you send ILL requests to needs to exist as a location in **NRE/VDX**.

6.2 SEARCHING LOCATIONS

Click the **Location** button in the left-hand menu bar to display the Location Search screen:



Location Search

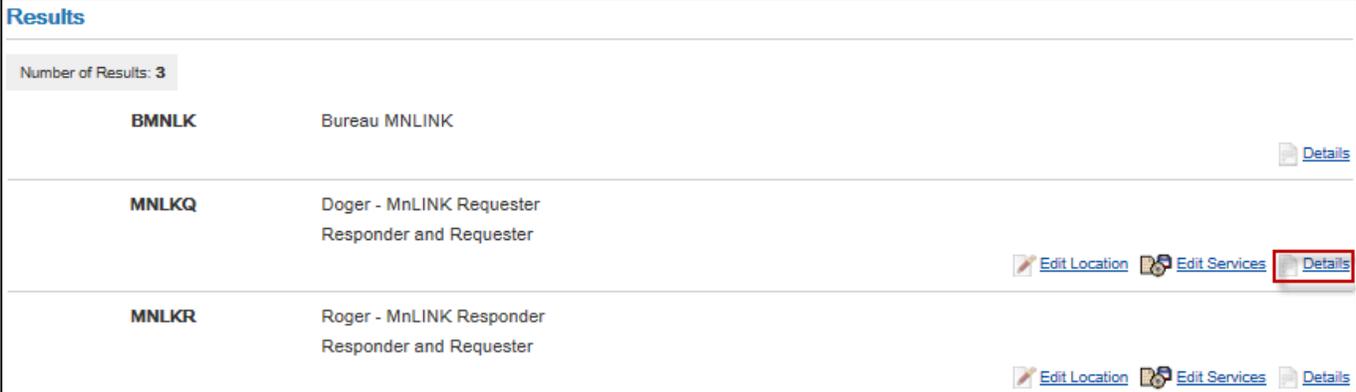
BibSearch
Requests
Work Queue
User
Location
Reports
Batch Reruns
Logout
Help

Barcode

Search Location Symbol ▾
for
Match Exact Any part First part Last part
Search [Reset](#)

You may search for locations by any word in their name or by symbols associated with the location.

Once you have constructed your search, click the **Search** button to display results.



Results

Number of Results: 3

BMNLK	Bureau MNLINK	Details
MNLKQ	Doger - MnLINK Requester Responder and Requester	Edit Location Edit Services Details
MNLKR	Roger - MnLINK Responder Responder and Requester	Edit Location Edit Services Details

Click the **Details** button to view the location record:



Location

Location Code MNLKQ
ILL Symbols MNLKQ (FDI: FDI)

Short Description Cassidy
Long Description Doger - MnLINK Requester
Interloan Status Responder and Requester
Suspended No
Admin Home Action Request Work Queue

Delivery Address

[Show/Hide](#)

Suite 240
 7400 W 132
 Overland Park
 Kansas
 66213
Email hortonr@oclc.org

Opening Times

Mon	Tue	Wed	Thu	Fri	Sat	Sun
Yes	Yes	Yes	Yes	Yes	No	No

Local Holidays

Description	Start Date	End Date	Type
Memorial Day 2011	31 May 2011	31 May 2011	Closed
independence	04 Jul 2011	04 Jul 2011	Closed
Library Re-carpeting	05 Sep 2011	20 Sep 2011	Suspended - No Requesting

Calculated Holidays

Description	Start Date	End Date	Type
Memorial Day 2011	31 May 2011	31 May 2011	Closed
independence	04 Jul 2011	04 Jul 2011	Closed
Library Re-carpeting	05 Sep 2011	20 Sep 2011	Suspended - No Requesting

6.3 SUSPENDING YOUR LOCATION AS A LENDER

Some systems do not allow members to suspend themselves. If this is the case you will need to contact your Help Desk to have them suspend your library. If your library will not be able to participate in interlibrary loan as a lender for a period of time, you can temporarily suspend your library as a lender. It



is a good idea to do this if you know you will not be able to deal with requests for a time as it will prevent requests being sent to your library from other **NRE/VDX** users on your system.

Enter the Location area of **NRE/VDX** by clicking on **Locations** in the menu bar.



Then click the **Edit Own** link at the top of the screen:



Midway down the page, below your library's name and address details, you can set your ILL unit's open and closed days. Set Yes for the day your ILL Department is open and No when it is closed.

Opening Times						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
Yes ▾	Yes ▾	Yes ▾	Yes ▾	Yes ▾	No ▾	No ▾

You can also define or edit any forthcoming holidays:

Local Holidays				New Holiday	Edit Holiday	Delete Holiday
Description	Start Date	End Date	Type	Edit/Delete?		
Memorial Day 2011	31 May 2011	31 May 2011	Closed	●		
independence	04 Jul 2011	04 Jul 2011	Closed	●		
Library Re-carpeting	05 Sep 2011	20 Sep 2011	Suspended - No Requesting	●		

You can add a Suspension period by clicking on **New Holiday**.

You should enter a description, choose a start date and end date by clicking on the calendar controls, and choose a suspension type from the Closure Type drop-down, then click **Save & Close**.



New Holiday

Description

Start Date (e.g. 10 Jun 2009)

End Date (e.g. 10 Jun 2009)

Closure Type ▼

Save Save & Close Cancel

No requests from libraries within your NRE/VDX system will be sent to the library during the suspension period. The Closure types are:

Open	Used only for holidays to indicate that your library is open on that holiday and that NRE/VDX should include that day when determining the date by which a request will expire.
Closed	Used only for holidays to indicate that your library is closed on that day and that NRE/VDX should not count that day when determining the date by which a request will expire.
Suspended – No Requesting	Used when you want exclude your library from receiving requests for a period of time. Choosing this option will also prevent your own users from creating borrowing requests for that period.
Suspended – Requesting OK	Used when you want to exclude your library from receiving requests for a period of time. Choosing this option will allow your users to create borrowing requests during that period of time.

6.4 SETTING DEFAULT HOME PAGE IN THE LOCATION RECORD

With the appropriate permissions the user may select the default home page for all the users from a particular location.



Location

[Save](#) [Reset](#)

Location Code MNLKQ
ILL Symbols MNLKQ (FDI:FDI)

Short Description Cassidy
Long Description
Interloan Status Responder and Requester ▾
Work Group Page
Suspended No
Admin Home Action Request Work Queue ▾
End User Home Action
Delivery Address

- Advanced Request Search
- Advanced Z3950 Search
- Location Search
- Login Page
- Request Search
- Request Work Queue**
- User Search
- Z3950 Search

[Show/Hide](#)
 [New Address](#) [Delete Address](#)



7 REPORTS

7.1 OVERVIEW

NRE/VDX has a number of predefined statistical Reports, as well as other Reports designed to assist ILL staff with general request processing.



Reports are accessed by clicking **Reports** on the left menu bar.

ILL Reports

- Average and maximum supply times by supplier
- Average and maximum supply times to requesters
- Batch Reruns
- Borrowers
- Copy requested per title
- Copy supplied per title
- Daily ILL Statistics
- ILLs Shipped but not Received
- ILLs not supplied received
- ILLs not supplied sent
- Incoming requests by requester
- Incomplete requests - as Requester
- Incomplete requests - as Responder
- Loan requested per title
- Loan supplied per title
- Monthly ILL Statistics
- Outgoing requests by supplier
- Requester ILL Status Summary To Be Acknowledged and Idle requests Suspended
- Requests by days of the week
- Responder ILL Status Summary To Be Acknowledged
- To Be Acknowledged requests requiring action - as Requester
- To Be Acknowledged requests requiring action - as Responder

Start Date  (e.g. 1 Apr 2007)

End Date  (e.g. 10 Jun 2007)

Generate Report [Reset](#)



Note that date fields require the date format of DD MMM YYYY (e.g., 28 May 2014).

After selecting a report and entering the dates (if applicable), press **Generate Report** to display the report.



7.2 REPORT SUMMARIES

7.2.1 Average and Maximum Supply Times by Supplier

This counts supply days for the fulfilled requests received by your library from other libraries or suppliers. The performance figures show the average and maximum days for each of your library's suppliers. This is calculated on the *received date* minus the *entry date* of the request.

7.2.2 Average and Maximum Supply Times to Requesters

This report counts the supply days for the requests made to your library by other libraries. It measures the performance of your own library at supplying material. This is calculated on the *shipped date* of the request minus the *request date*.

7.2.3 Batch Reruns

This is a menu of reports originally printed from the Work Queue (Pick List, Received List, Returned List) that may be reprinted. For the Pick List, the current Request status is updated to show materials that have already been processed and do not require retrieving for request fulfilment. Batch numbers are unique for each type of report per location. **NRE/VDX** by default displays the reports printed in the last 7 days. Use the Start Date and End Date fields to see reports older than that.

7.2.4 Copies Requested per title

This report shows the titles of copy requests made by your library. It is alphabetical by title and shows the issue, the request number, the request date, the current responder and the current status of the request.

7.2.5 Copies Supplied per title

This report shows the titles of copy requests filled by your library. It is alphabetical by title and shows the issue, the request number, the requesting library's name and the date the copy was shipped.

7.2.6 ILL Daily Statistics

NRE/VDX adds up each day's statistics shortly after midnight for the previous day.



Daily ILL Statistics report for MNLKQ

Date	Z3950	Requester			Responder			
	Searches	Requests	Shipped Ind.	Received	Requests	Shipped	Not Supplied	Expired
28 Feb 2011	0	0	2	2	0	0	0	0
25 Feb 2011	9	2	0	0	0	0	0	0
28 Jan 2011	1	0	0	0	0	0	0	0
29 Sep 2010	3	2	0	0	0	1	0	0
28 Sep 2010	3	4	0	0	0	0	0	0
20 Sep 2010	0	0	1	0	0	0	0	0
19 Sep 2010	5	1	1	0	0	0	0	0
18 Sep 2010	2	2	0	0	0	0	0	0
23 Apr 2009	9	1	0	0	0	0	0	0
26 Mar 2009	4	1	0	0	0	0	0	0
03 Mar 2009	1	0	0	0	0	0	0	0
02 Mar 2009	1	0	0	0	0	0	0	0
25 Feb 2009	2	0	0	0	0	0	0	0
17 Feb 2009	4	5	0	0	0	0	0	0
13 Feb 2009	2	0	0	0	0	0	0	0
11 Sep 2003	0	1	1	0	1	0	0	0

The fields in this report are:

Date	The day being reported
Z3950 Searches	Counts submitted Z39.50 searches. Each search entry submitted counts as one search even though more than one target (data resource) is selected for the overall search. For example, entering a Simple Search for Title "Emma" and searching Library of Congress and WorldCat counts as one search.
REQUESTER	
Requests	Counts requests created by this location. Requests which have not yet been authorized are included in this count.
Shipped Ind.	Counts requests where the lender has notified the borrower that the item has been



	shipped.
Received	Counts requests that this location processed as Received.
RESPONDER	
Requests	Counts requests sent to this location as a lender.
Shipped	Counts requests this location processed as Shipped
Not Supplied	Counts requests this location directly processed as Not Supplied. It does not include the requests set to this status automatically because they have reached the expiration date at your location.
Expired	Counts requests you have allowed to expire by not processing them within the number of days allowed.



A request that has gone to multiple locations only counts as 1 request on the requester side, so 1 request on the requester side could map onto 4 responder request records, if the request was now on the 4th location in the rota.

7.2.7 ILLs Not Supplied Received

This report counts how many Requests there are at your location, as a borrower, at the Not Supplied status. The total number of the Not Supplied responses is shown regardless of the Action that caused the Not Supplied status.

7.2.8 ILLs Not Supplied Sent

This report counts how many Requests there are at your location, as a lender, at the Not Supplied status. The total number of the Not Supplied responses is shown regardless of the Action that caused the Not Supplied status.

7.2.9 ILLs Shipped but not Received

This lists brief records of items your location has actioned as “Shipped” without a subsequent action of Received made by the borrowing location.

7.2.10 Incoming Requests by Requester



This shows the number of Requests sent to your library, listed by each Requester. This report lists only requests that are currently at your library or for which your library was the last responder. It can be limited by the date the request was first created by the requester.

7.2.11 Loans requested per title

This report shows the titles of loan requests made by your library. It is alphabetical by title and shows the issue (if any), the request number, the request date, the current responder and the current status of the request.

7.2.12 Loans supplied per title

This report shows the titles of loan requests filled by your library. It is alphabetical by title and shows the issue (if any), the request number, the requesting library's name and the date the item was shipped.

7.2.13 Monthly ILL Statistics

NRE/VDX adds each day's statistics automatically just after midnight to the monthly count, therefore, the figures for the current day are not included. The field definitions are the same as for the Daily ILL Statistics report.

Month	Z3950		Requester		Responder			
	Searches	Requests	Shipped Ind.	Received	Requests	Shipped	Not Supplied	Expired
February 2011	9	2	2	2	0	0	0	0
January 2011	1	0	0	0	0	0	0	0
September 2010	13	9	2	0	0	1	0	0
April 2009	9	1	0	0	0	0	0	0
March 2009	6	1	0	0	0	0	0	0
February 2009	8	5	0	0	0	0	0	0
September 2003	0	1	1	0	1	0	0	0

7.2.14 Outgoing Requests by Supplier



This shows the number of requests made by your location to each supplier between the specified dates. The dates are the date of the request was first made, not the date the request was sent to that particular supplier.

Outgoing requests by supplier	
Location	Number
MnLINK Responder	23

7.2.15 Requests by Day of Week

This reports show two lists: the number of requests received by your library for each day of the week, and the number of requests made by your library to other locations for each day of the week within the specified period.

Requests by days of the week	
Received	
Day	Number
Thursday	1
Sent	
Day	Number
Sunday	1
Tuesday	18
Wednesday	2
Thursday	3
Friday	2
Saturday	2

7.2.16 To Be Acknowledged requests requiring action – as a Requester

These are requests for which your library is the borrower and which have had an action taken by the lender. The requests are in a 'To Be Acknowledged' status, indicating that an 'Indication' action has been received. These are requests which may require your attention.



7.2.17 To Be Acknowledged requests requiring action – as a Responder

These are requests for which your library is the lender and which have had an action taken by the borrower. The requests are in a 'To Be Acknowledged' status, indicating that an 'Indication' action has been received. These are requests which may require your attention.



8 APPENDIX

8.1 TABLE OF AVAILABLE ACTIONS

Possible Request Actions as a Borrowing Library

Local Change request	This is a standard action available for all request statuses, allowing you to edit the request or its rota.
Lost	Report to the supplying library that the item has been lost.
Message	This is a standard action available for all request statuses, allowing you to send a message to the Responding library.
Renew	Request renewal of the loan of the item. The status will change to Renew/Pending until you receive a response from the supplying library.
Returned	Inform the supplying library that you have returned the loaned item. The request's status will change to Returned until you are informed by the supplying library that they have received the item back.
Damaged	Use this action to record damage to the item while on loan to your library. Details of the damage can be recorded in a notes field.
Cond. Reply No	You are unable to meet the responding library's conditions - this action causes the request to be considered Not Supplied by the current responder and it will move to the next location on the rota.
Cond. Reply Yes	You accept the responder's conditions. This action moves the request back into the responder's In Process queue and picking list.
Add private note	Add an internal note to the request. This action does not cause an indication action on the lending partner's request.
Cancel	Inform the lender that you no longer want the item from the lending library. Once approved, the request will be sent to the next library in the rota.
Complete	The request should no longer be



	considered active.
Received	A requested item has been received in your library.
Renew	Request that the lending library extend the due date for a borrowed item.
Request	The initial action in NRE/VDX. This action creates/sends an ILL request.
Send Public Note	This action sends a message to the current responder.
Send User Alert	Send an ad-hoc message to the requesting patron.
Terminate Request	The patron no longer requires a requested item. This action sends a cancel message to the current responder. If the responder approves the cancellation, the request will not be sent to any subsequent rota locations.

Possible request actions as a Lending Library

Answer Cond.	You are willing to supply the item provided specified conditions are met
Answer Nonsupply	You are unable to supply the item being requested. This action will move the request on to the next location on the requester's rota.
Answer Will Supply	This action informs the requester that you will supply the item, but it is not currently ready to be sent – this action stops the request from expiring or moving on in the rota.
Local Change request	This is a standard action available for all request statuses, allowing you to edit the request.
Message	This is a standard action available for all request statuses, allowing you to send a message to the Requesting library.
Lost	Report that the item has been lost.
Overdue	Indicate to the requesting library that the loan is overdue and should be renewed or returned
Recall	Recall the item from the requesting library, before the end of the agreed loan period.
Add private note	Add an internal note to the request. This action does not cause an indication action



	on the lending partner's request.
Cancel No	Indicate to the borrowing library that you cannot honor their demand to cancel a request.
Cancel Yes	Indicate to the borrowing library that you agree to cancel their request.
Checked-in	Record that a borrowed item has been returned to your library. This is the end of the life cycle for a loaned item.
Complete	The request should no longer be considered active.
Renew No	Indicate to the borrowing library that you do not agree to extend the due date of an item.
Renew Yes	Indicate to the borrowing library that you agree to extend the due date of an item. In this action, you will indicate the new due date.
Send Public Note	This action sends a message to the borrowing library.

8.2 STATUS

The following statuses can be seen in Borrower requests:

Cancel Pending	You have requested cancellation of the request, but the cancellation has not yet been acknowledged by the responding library.
Cancelled	The cancellation you requested has been approved by the lending library.
Conditional	The transaction has reached a stage where the request can only be filled if you can meet certain conditions set by the Responding library.
Idle	A new request, not yet authorized or transmitted to any potential suppliers.
Not Supplied	The transaction has reached the end of its rota and none of the responding libraries has been able to supply. You need to add more locations to the Rota or Complete the request.
Pending	A request has been made and the item or a message is expected from the Responding library.
Received	The item has been received from the supplying library.
Renew Pending	You have requested a renewal of the loan from the supplying library, but the renewal has not yet been acknowledged.



Returned	The item has been sent back to the supplying library – you are awaiting confirmation of receipt from the supplier.
Shipped	The supplying library has sent you the item and is awaiting acknowledgement of receipt.
Lost	The item cannot be found.

The following statuses can be seen in Lending requests:

Cancel Pending	The requesting library has requested cancellation of this request. You should inform them if it can be cancelled or not.
Conditional	You have sent a message to the requester about these requests, that you are willing to supply if certain conditions are met.
In Process	These are requests which have come in from requesters and are awaiting action
Not Supplied	You are unable to supply these items.
Overdue	You have supplied this item to the requesting library and have sent a message that it is now overdue for return
Shipped	You have shipped the items in this list to the requesting libraries and are awaiting their return