

# VDX Borrower Queue

## New

All requests start here and most move to *Pending* automatically. If a request is stopped in *New*, the 3 main reasons are:

1. The item requested is locally owned, handle as follows:

Authorization: *Check Manual*

- *Click Details*
- *Select Audit tab*
- *Messages > Description > Local location on Rota*

To remove request

- *select Complete*

To forward request to lenders

- *Submit Action Request*
- *Select Rota tab*
- *Highlight local locations*
- *Click Delete selection*
- *Click Submit*

2. The request is considered a duplicate of another request; you may handle it in one of the following ways:

To send a message to the lender

- Authorization: *Check Manual*
- *Click Details*
- *Select Audit tab*
- *Messages > Description > Validation*
- *Messages > Message > "This request may be a duplicate of request no: 1234567"*

To remove the request

- *select Complete*

To forward the request to lenders

- *Submit Action Request*
- *Click Submit*

### 3. The patron has added Special Instructions

Authorization: AutoMediated:AuthManual

- *Click Details*
- On the *Main* tab view Notes information and determine whether this needs to be forwarded to the lenders

To forward note

- *Submit Action Request*
- Leave New Note Type as *to all lenders*
- Enter appropriate information in Notes box

To not forward note

- *Submit Action Request*
- *Click Submit*

### **Pending**

Requests that are in this queue position are awaiting a Lender response.

### **Shipped**

Requests that are in this queue position will generally only be actioned when the item is in hand at the Borrowing library. When the item is in hand you would choose the Action *Received*.

### **Received**

Requests will stay in this queue position while the end user has the material. When the material is ready to be returned by the Borrowing library the next Action will be *Returned*.

### **Returned**

Requests will stay in this queue position while the item is in transit to the original lending library. The request will be automatically *Completed* from this queue position when the Lender performs the *Checked In* Action.

### **Not Supplied**

Requests in this queue position are finished.

- Choose the *Complete* option when ready to remove the request from the end user's ZPortal account.
- If you do not *Complete* the request manually, the system will remove the request after holding this status for 30 days.

## Cancel Pending

Requests in this queue position were either Cancelled by the end user on ZPortal or someone chose the Action of *Cancel* or *Terminate Request* on VDX. These requests are awaiting a response from the possible Lender.

- When the *Cancel* is chosen in ZPortal, this matches the Action of *Terminate request* in VDX.
- *Terminate Request* in VDX is chosen when the request is to be ended.
- The Action *Cancel* on VDX will move on to the next lender in the Rota.

## Cancelled

Requests in this queue position are finished.

- Choose the *Complete* option when ready to remove the request from the end user's ZPortal account.

## Conditional

Requests in this queue position are awaiting a response to a question from the possible Lender. **\*\*\*DO NOT RESPOND WITH ACTION MESSAGE\*\*\***

- *Click Details*
- On the Main tab view Notes information
- If unable to meet conditions
  - *Submit Action Conditional Reply-No*
  - *Click Submit*
- If able to meet conditions
  - *Submit Action Conditional Reply-Yes*
  - Leave New Note Type as ToCurrnt Lndr
  - Enter appropriate information in Notes box
  - *Click Submit*

## Renew/Pending & Renew/Overdue

Requests in these queue positions are awaiting a response from the Lender.

- When you choose *Submit Action Renew*
  - It may be helpful to the Lender to enter a Desired Due Date
- When the lender responds *Renew Answer-No*
  - Request will move back to the *Received* queue position
    - Request can be identified in *Waiting* column
- When the lender responds *Renew Answer-Yes*
  - Request will move back to the *Received* queue position
    - Request can be identified in *Waiting* column
    - Click *Details*
    - Select *Audit* tab
    - New due date will appear in *Dates* box

## Recall

It is very important to contact your patron about Recalled Requests.

## Not-Received/Overdue

This may be a message for an item that was lost in transit from the lender.

## Overdue

Requests in this queue position have had the Action *Overdue* performed by the Lender.

## Lost

Requests in this queue position have been reported lost permanently by the end user.

- Do not choose to mark an item *Lost* unless you are absolutely sure the item is not going to be returned. This Action cannot be undone.
- Communicate by Action *Message* until the lender has been paid.
- *Complete* the request once the item has been paid or replaced.

# VDX Lender Queue

## In Process

Requests in this queue position are waiting to be filled.

- If you are going to fill the request
  - Fill later (to suspend expiration date)
    - Submit Action *Answer Will Supply*
    - Click *Submit*
  - Fill today
    - Submit Action *Shipped*
    - Enter Due Date [select popup calendar]
    - Click *Submit*
- If you are not going to fill the request
  - Submit Action *ANSWER NONSUPPLY*
  - Select appropriate Reason from drop-down menu
  - Click *Submit*
- Select Action *Answer Conditional* [Request will move to Conditional queue]
  - Select appropriate Reason from drop-down menu
  - Leave New Note Type *ToCurrnt Lndr* and change *answer date* to 2 weeks.
  - Provide clear explanation of Conditions in New Note box
  - Click *Submit*

## Shipped

Requests in this queue position are in transit to the Borrower, with the Borrower's end user, or in transit back from the Borrower.

- Requests received that are *Returned* by the Borrower will need to have the Action *Checked In*
- *Checked In* will automatically Complete the request for the Borrower and the Lender

## Checked In

Requests in this queue position have been reopened. *Checked In* is a final Action that would have automatically *Completed* the request. Check to see if there are any notes attached. *Complete* when done.

## Cancel Pending

Requests in this queue position should be responded to in a timely manner. If the request appears here it has not been Actioned *Shipped* yet.

Cancel the request

- Submit *Cancel Reply-Yes*
- Click *Submit*

## Cancelled

Requests that have been Actioned *Cancel Reply-Yes* go here momentarily and are then automatically *Completed*.

## Conditional

Requests in this queue position are awaiting a response from the Borrower

- If the Borrower responds *Conditional Reply-Yes*
  - Request will move back to the In Process queue position
    - Request can be identified in Waiting column
- If the Borrower responds *Conditional Reply-No*
  - Request will move to the Not Supplied queue position
    - Request can be identified in Waiting column

## Renew/Pending & Renew/Overdue

Requests that are in this queue position should be responded to in a timely manner.

**\*\*\*MANY LIBRARIES CONSIDER NO RESPONSE TO A RENEWAL REQUEST AS A RENEWAL OK FOR SAME LOAN PERIOD\*\*\***

- Submit Action *Renew Answer-Yes*
  - Enter Renew date in Due Date box
  - Click *Submit*
- Submit Action *Renew Answer-No*
  - Click *Submit*

## Recall

Requests in this queue position have been requested for immediate return by the Borrower

- Submit Action *Recall*
  - Leave New Note Type ToCurrnt Lndr
  - Enter new due date in New Note box
  - Click *Submit*

## Not Supplied

Requests in this queue position have been responded to by the Borrower *Conditional Reply-No*. These requests can be *Completed*.