Virtual Online Community Library (VOCaL)



# **User Guide**

for placing Interlibrary Loan Requests



Place Interlibrary Loan requests using the INFO end user interface...

anytime, anywhere

from home from work from school from a VOCaL kiosk



from anywhere there is internet access





is the bibliographic catalogues and Interlibrary Loan system of Ontario public libraries in partnership with Ontario Library Service-North and Southern Ontario Library Service with support from the Ministry of Culture.

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## Sign-In Procedure

 Use the link on the VOCaL website located on the Find a Book page to go to: http://info.vdxhost.com/en/zportal



- 2. Once connected, select **Sign In** on the left side panel of the Welcome screen.
  - Enter your User ID the 14 digit barcode number on the VOCaL library card that was provided when you registered to become a member of the Virtual Online Community Library.
  - Enter the password that was provided to you by VOCaL when you registered.
     Passwords are case sensitive so be aware of upper or lower case entry.
  - Authentication Service: Select the name of the Authentication Service your user account is registered with from the drop down menu.

Your Authentication Service library is Virtual Online Community Library.



TIP: Type first letter of your home library name to advance on the list and limit scrolling.



Example sign-in of a user registered with Virtual Online Community Library

## **General Screen Navigation**

- First screen after log-in is always the Standard Search screen
- Left panel buttons are to choose an activity
- Browser BACK button is not used in INFO



This is the first screen that opens once you have successfully signed-in to INFO

## Selecting a Search Profile

Note: A user who is registered with Virtual Online Community Library would use the **OLS-North [shared**] profile as their "get started" profile.

- Users should always start a search with their logical "get started" profile. Select a different profile in the list to search against ONLY IF you do not get the desired results from your "get started" profile. If you get results in your get started profile it is not necessary to search again using alternate profiles.
- Open the Current Profile drop down list and select the grouping of library catalogues that best represents your geographic area.



### Standard Search

A standard search is **key word** appearing any where within the bibliographic record. You can enter words randomly in any order or you can term browse words in a specific order by putting quotation marks around the words. Results are more specific depending on what you enter.

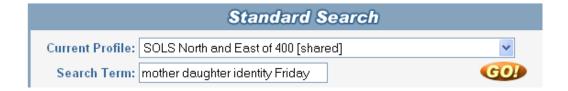


**TIP:** The more you enter, the less you get. By adding author's surname to a few key words in a title you get more precise results.

**Example:** Suppose you want Dr. Phil McGraw's book titled "Life strategies: doing what works, doing what matters"

You enter - Life strategies Many results
You enter - "Life strategies" Fewer results
You enter - Life strategies McGraw Even fewer results

**Example**: Suppose you know that Nancy Friday wrote a psychology book about mothers and daughters and searching for identity but you are not sure what the exact title is. You can combine key words from the TITLE and AUTHOR in a Standard search.



### Advanced Search

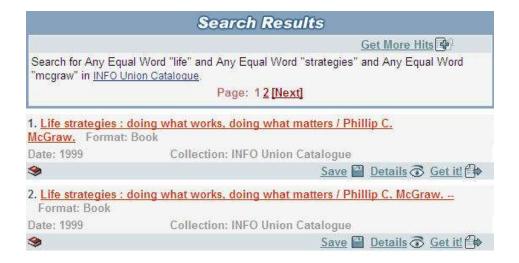
Advanced search uses selectable fields and Boolean operators to retrieve more precise results.

For instance, if you want to view only psychology books on mother daughter relationships you can retrieve that using **Advanced Search** and Boolean operators.



## Viewing Search Results

- To browse through multiple pages of search results, select Page: 1 2 3 [Next] at the top or the bottom of the screen.
- Select the title hotlink or the <u>Details</u> ink on the displayed result to see full details



## Record "Details" screen

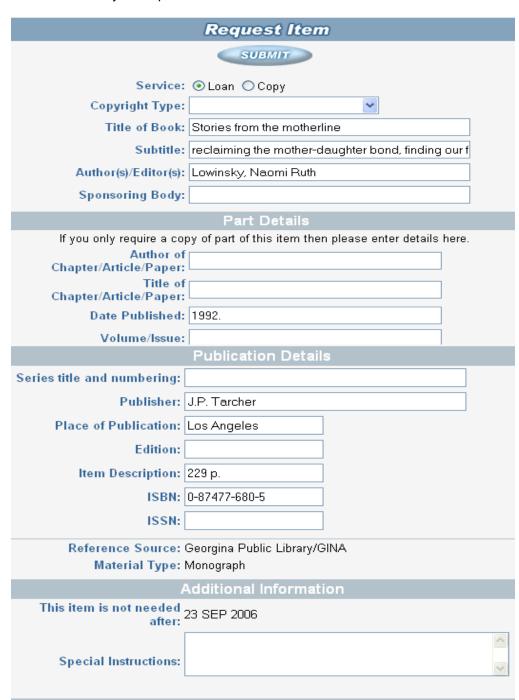
- You can navigate in full details mode, using <u>Previous Record</u> and <u>Next Record</u>
- You can Save a particular record into a Saved List to print, email, or request later.
- You can place an interlibrary loan request for an item using the Get it! hink.
- You can select the <u>Author</u> and <u>Subject</u> hot links to search for similar records.

For instance, if you select <u>Mothers and daughters</u> subject link you will get search results for every record with that subject heading from the collections in the chosen profile. Some of them are psychology books but some of them are children's picture books.



## Creating a Request from Search Results

- If you want to place an Interlibrary Loan request, select a record from the search results by using the <u>Get it!</u> ink.
- Occasionally, you may need to change the default service of "Loan" to "Copy" if you were requesting photocopies from a journal.
- There is rarely anything you need to add to this form. Just select SUBMIT, either at the top or bottom of the form and your request will be issued.



Using the
Get it!

link results in
this Request
Item form

## Confirmation that request was successfully submitted

 After you use the SUBMIT button the INFO system will respond with "Your request has been successfully submitted" and assigns an ID number to your request.





**TIP:** It is not necessary to print the request confirmation or make a note of the request number. You can browse the requests that you have in the system anytime you like without knowing the request ID numbers.

# Creating a Request from scratch

Occasionally, you may not find an item after searching against all the possible search profiles. You can still submit a request for it.

- Select <u>Create Request</u> under "My Account" in the left side panel. This will invoke a blank form for you to fill in.
- It is mandatory to fill in Title and Author. You may not know other publishing details.
- IMPORTANT Add extra information in the Additional Information section, such as:
  - read a review in Toronto Globe and Mail last week
  - saw author interviewed on Oprah TV show last week
  - this is not a brand new book but possibly published within the past 5 years
- Requests submitted using the blank "Create Request" form are flagged in the system for library staff attention. Library staff will try to verify the request and find lending locations.

# **Optional Features for Working with Search Results**

There are additional features for working with your search results that you may find handy to use. However, using these features is **COMPLETELY OPTIONAL**.

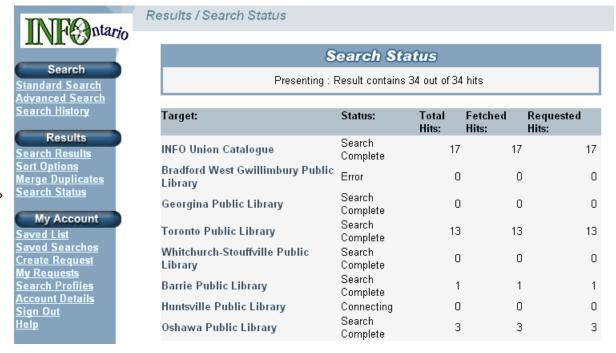
## Using \* to expand search terms (OPTIONAL)

You may want to experiment with using the \* as a wildcard in your search. This example is an Advanced subject search for a specific dog breed. Adding an asterisk on the end of the word facilitates retrieving bibliographic hits with the word "schnauzer" or the plural "schnauzers" in the subject heading.



## Checking Search Status (OPTIONAL)

It is not necessary but you have the option to select <u>Search Status</u> under "Results" in left side panel to determine how many results you have and from which catalogues.



## Merging Duplicates in the search Results (OPTIONAL)

It is not necessary but you have the option to Merge Duplicates under "Results" in the left side panel.



Click on the **Merge** button to merge duplication in the search results.

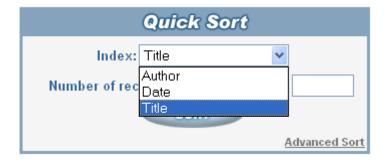
Note there are 22 unique records and 12 duplicates in the 34 hits in our *miniature schnauzer* example search after they have been merged.



## Sorting Search Results (OPTIONAL)

It is not necessary but you have the option to select <u>Sort Options</u> under "Search Results" in the left side panel to arrange your results in the manner you wish.

Perhaps you want to see if there are several titles by the same Author or you would like to sort by Date so the most recently published items are at the top of the list.



## **Using Filter Options (OPTIONAL)**

You can filter bibliographic search results by format, language and audience level. In Standard Search, you can filter on a result set. In Advanced Search, you can specify filters before executing the search.

**Example**: Finding a Large Print edition of "Tristan Betrayal" by Robert Ludlum

1. Enter few key words from title and author in a Standard search.

Search Term:	tristan betrayal ludlum	

2. AFTER the result set displays, select "Filter Options" under Results in left panel. Select Format(s) to open the option list. Use Clear all and then select "Large Print Book".

Filter Options							
Limit results by date:	O Specific year: O Range of years from:						
Format(s): click to sc.  Report  Large Print Book Braille Book Select all Clear all	oll list of options						
Language(s): click to Level(s): click to scro	CONTRACT OF WAY						

3. The original result set of 21 is reduced to the selected format. In this example, 3 Large Print results and 18 results filtered out because they are not Large Print.



## Search History (OPTIONAL)

It is not necessary but you have the option to view a history list of the searches you have performed during your logged in session. When you end your session by signing off, this history is cleared.

- You can view this list by selecting <u>Search History</u> under "Search" in the left side panel.
- You can <u>Re-Run</u> a search from History or <u>Edit</u> it by changing some of the details or the profile used to search against.



## Saving the entire Search for future reference (OPTIONAL)

It is not necessary but you have the option to use the <u>Save Search</u> link on search results to save the search for future reference. Saved searches are saved indefinitely, until the user deletes them.

- You can see your saved searches by selecting <u>Saved Searches</u> under "My Account" in the left side panel.
- You can <u>Re-Run</u> the search as it was originally run or <u>Edit</u> the search to change how it was composed or to select a different search profile to run it against.



Example of Saved Search screen

## Saved List (OPTIONAL)

It is not necessary but you have the option to save specific records in search results to a Saved List to print, email, or request later.

- Use the <u>Save</u> link on the request result to save it to a file.
- To view your saved items, select **Saved List** under "My Account" in the left side panel.
- IMPORTANT Note: The Saved List is cleared when you Sign Out of your session.



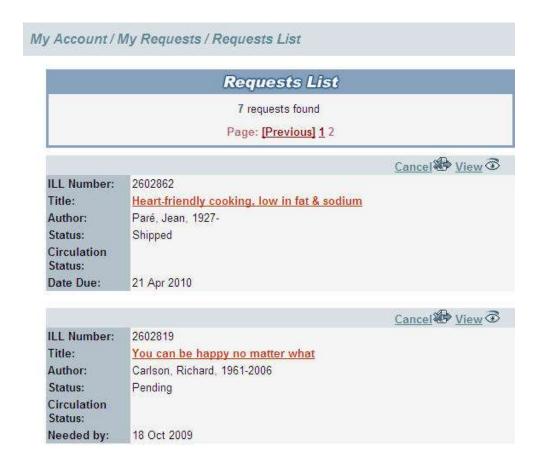
# Cancelling a request

If a request is "New" or "Pending" (has not yet been shipped by a lending library) you can cancel it by selecting <u>Cancel</u> link on the request itself. Click Submit on the next screen that presents to follow through on the cancellation or select Cancel on the next screen if you wish to abort the cancellation.



# How is your request doing?

- Select <u>My Requests</u> under "My Account" in left side panel to see the requests you have in the system.
- You can sort the results by Request #, Title or Author and you can specify 5, 10, 15, 20 records per page.
- You can see the request in more detail by selecting View



# Interpretation of Request Status

Status: New

means that the request has not yet been fully processed into the VDX system by Ontario Library Service ILL Unit staff.

Status: Pending

means the request is pending action from a potential lending library

Status: Cancelled

means that a cancellation was submitted for an item no longer wanted

Status: Shipped

means that a lending library has agreed to lend the item and is shipping it to you. The item is on its way.

Title: \*SELECT VIEW TO SEE NOTE in front of the title means you should

select the View link on the request to open full details screen. Scroll down to the Notes section to see information provided by the library's

interlibrary loan department staff.

# What to do when you get a book in the mail

- Keep the bubble pack padded envelope that the item was mailed in to use when you return the item.
- Keep the Return Postage Paid return mailing label that was sent with the book to affix to the return parcel.
  - \*See below for instructions if the parcel does not contain the return mailing label.
- 3. Make note of the due date on the packing slip that was sent with your requested item. This is the date that the item is due back to the lending library. Please put it in the return mail 3-5 days before the due date to allow the item to get back to the lending library in time.

# Returning the borrowed item

- 1. Write "Returning" anywhere on the packing slip that came with the book that noted the request details, lending library and due date. Put it inside the book for the lender's reference when they are handling the returned item.
- 2. Package item in padded mailing envelope that it arrived in. Securely tape the parcel closed.
- 3. Remove the old "Ship To" address label and replace it with Library Books "Return Postage Paid" label. This label is the upper portion of the shipping label that was sent with the book.
- 4. Tape the pre-paid return label on the package, making sure it is securely affixed with tape around all of the outside edges to prevent the label from being caught and torn off during handling.
- 5. Retain the lower portion of the shipping manifest (below the dashed cutting line) that contains the Item ID number to facilitate tracing lost parcels through Canada Post. Write the title, lending library and date it is being returned on this slip and save it in case there are follow-up inquiries.
- The parcel can be taken to your nearest Canada Post parcel delivery outlet for mailing.
  No additional postage needs to be purchased to return the item when you have a Library Books "Return Postage Paid" label on the package.

# What to do if the Return Postage Paid mailing label has been misplaced

Occasionally the lending library forgets to include the Return Postage Paid mailing label when the book is packaged for mailing to you or it might get misplaced while the item is in your possession.

- 1. Call or email the VOCaL Interlibrary Loan Help Desk. Contact information is on the last page of this user guide.
- 2. Provide the title of the book and the name of the lending library.
- 3. HelpDesk will email you a PDF file of the return mailing label that you can print and use to return the item.

# Example of the Return Postage Paid mailing label

CANADA POST From/Expéditeur: Library Livres de POSTES CANADA JANE DOE **Books** bibliothèque 0001001549 32 AVERY LANE PO BOX 1456 Return Postage Paid/Port de retour payé MOOSONEE ON POR 1B0 No Manifest Required / Manifeste non requis Online EST / En ligne O.E.E V9.4.0 Weight/Poids: 2.000 Upper portion goes 1001 5496 9907 5952 on parcel D030048375 Order / Commande: Customer Ref / No. réf. client: VDX # 45678 Reference / Référence: VDX # 45678 To /Destinataire: Timmins Public Library ATTENTION SIGNATURE REQUIRED SIGNATURE REQUISE 320 Second Avenue Timmins ON P4N 8A4 P4N Sender warrants that this item does not contain dangerous goods L'expéditeur garantit que cet envoi ne contient pas de matières dangereuses. 1001 5496 9907 5952 Vuméro d'identification de votre article. Item Id of your parcel. Order / Commande: D030048375 INSTRUCTIONS Cut on 1. Choose a box designed for shipping. dashed 2. Wrap your items so that they are secure in the box and seal the box using line. proper shipping tape 3. Cut the label on the dotted line and retain the bottom half for tracking purposes. Retain 4. Tape the label so it appears squarely on the largest side of the box lower (do not bend it around sides or end of box). Yonder comes the train portion to any part of the barcode on the label Take the parcel to a Canada Post retail outlet for shipping. All items trace lost except Priority Courier may also be deposited in a Street Letter Box. parcels Mailed back to Timmins 1. Choisissez une boîte conçue pour l'expédition. líbrary Oct 24/09 2. Empaquetez solidement vos articles dans la boîte et scellez le tout avec du ruban d'expédition. 3. Découpez l'étiquette le long du pointillé et conservez la partie inférieure 4. Apposez l'étiquette pour qu'elle paraisse entièrement sur le côté le plus grand de la boîte (ne pas la replier sur les côtés). Ne recouvrez aucune partie du code à barres de l'étiquette Write title and 5. Apportez le colis à un comptoir postal de Postes Canada pour date you mailed expédition. Tous les envois sauf ceux des Messageries Prioritaires peuvent être déposés dans une boîte aux lettres publiqu item back to the lending library on A barcode should be printed on the label because Delivery Confirmation is selected If no bar code is visible, please contact the help desk at 1-800-277-4799 for assistance this slip and keep Un code à barres devrait être imprimé sur l'étiquette lorsque la confirmation de livraison est choisie.

Si le code à barres n'apparaît pas, veuillez communiquer avec le service d'assistance au 1-800-277-4799.

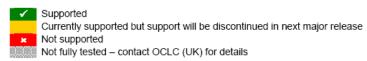
for your reference

## Troubleshooting access problems

#### Check browser version

- (a) Go to Help menu at the top of your opened browser.
- (b) Under Help you will usually see "About....".
- (c) Select "About" to see the version of the browser you are currently using.

#### Legend



#### **Browsers**

Note	5.5	6.0	7.0	Firefox 1.x	Firefox 2.x	Firefox 3.x		5.2 ac	refox 0 Mac	refox 0 Mac	Safari 1.2 MAC X	Safari 2.0 MAC X
	Э	ш	Э	Ε ←	Ξ 7	Œκ	Ш	ШŠ	Б. 1.	Fi 2.	űΣ	űΣ
OLIB WebView 2.6.1	✓	✓	✓	✓	✓	✓		Je -				
OLIB WebView 2.6.2	<b>✓</b>	<b>*</b>	<b>*</b>	<b>✓</b>	<b>✓</b>	✓		H.				
VDX /ZPORTAL 3.1	Je .	<b>*</b>	<b>*</b>	<b>✓</b>	<b>✓</b>	<b>✓</b>		<b>*</b>	<b>✓</b>	3£	<b>▲</b>	
VDX /ZPORTAL 3.2.1	æ		1		<b>√</b> "	✓ -						
VDX /ZPORTAL 4.0 aka "Mars"	æ	æ	1	æ	✓ -	<b>✓</b> _		æ	Je	✓	3c	✓
VDX /ZPORTAL "Jupiter"	, it	, k	<b>\</b>	Je .	<b>*</b>	✓		H.		>	Je .	✓

## Browser navigation buttons

The browser BACK button can not be successfully used to navigate. Use zPortal navigation buttons.

## **Check Internet Explorer Settings**

- Verify that the settings in Tools > Internet Options > Privacy tab are set to "Medium" or "Low" or at least that "http://info.vdxhost.com/en/zportal" is set in the web sites to allow cookies.
- Verify Tools > Internet Options > General Tab > Browsing History > select "Settings" button.
   Under "Check for newer versions of stored pages" "Every time I visit the webpage" should be ticked.

#### Clearing browser cache

It's a good habit to clear browser cache from time to time. When it fills up it can affect performance. Sometimes clearing the cache will clear up a problem.

- Select Tools > Internet Options > General Tab > Browsing History
- Select "Delete" button Select "Delete files" button for "Temporary Internet Files".

# Ending an INFO session

When you wish to end your session, select Sign Out under "My Account" in the left side panel.

## Renewing a request loan period

You must contact the Interlibrary Loan Help Desk to request an extension on a loan period of an interlibrary loan item. Telephone or email the Interlibrary Loan Help Desk (**vocl@library.on.ca**) and provide:

- (a) the title of the book
- (b) the INFO system Interlibrary Loan request number
- (c) the name of the lending library

# Lost and damaged books

You are responsible for lost or damaged books. Parents are responsible for books borrowed by their children. If you either lose or damage a book, please contact the VOCaL Interlibrary Loan Help Desk.

# VOCaL Interlibrary Loan Help Desk Contact Information



**Telephone**: 1-800-387-5765, ext. 5113

Email: vocl@library.on.ca

**Hours:** Monday to Friday

8:30 a.m. - 4:30 p.m.