

Brief#1: Patron Web Interface

How different will using VDX be from how users currently request interlibrary loans?

Answers the questions

- How will library patrons access and use VDX?
- What are the benefits of pointing users to the OCUL VDX Web site for filling out ILL requests?

We are recommending that the OCUL VDX Web site replace the Web request forms that institutions now use. Otherwise, institutions will have to modify their forms in order to produce appropriately formatted email messages that the VDX system can understand.

The OCUL VDX Web site will look similar to the SOLS (Southern Ontario Library Service) Web site.

<http://info.library.on.ca/>

The home page includes 2 buttons. By pressing the search button - anyone will be able to search the database & catalogue targets listed on the Web site.

There will be a login button for authorized users to request interlibrary loans.

The Z39.50 database & catalogue search serves 2 purposes:

1. A discovery tool to allow users to search for materials at other locations. This part of VDX will be set up as soon as institutions supply Z39.50 information to us so Fretwell-Downing can set it up.
2. Populating an interlibrary loan request form with bibliographic information. (Imagine - correct bibliographic information - without the typos and partial entries!) This part of the Web site will be available for sites that have gone "live".

The OCUL VDX Web site will also provide users with information on the status of their requests.

We are investigating options to determine how best to link back the institution's ILL Web page so that users can easily get back to policy and other local information. This part of an institution's Web site will be maintained locally.

Here is a possible scenario for an undergraduate using the OCUL VDX Web site

- Undergraduate Bob searches the local OPAC for the book "Annoying the Victorians" but does not find that book in his local collection. He then hits a **Request through interlibrary loan** button which is a hyperlink to the OCUL VDX Web site.
- At the OCUL VDX Web site, Undergrad Bob can either sign in using his name and barcode in order to authorize for requesting interlibrary loans or at this point he may just want to search the Z39.50 OPACs listed on the Search Screen. Undergraduate Bob decides to just search.

- Undergrad Bob decides to search OPACs for the Trent, University of Western Ontario and AMICUS for "Annoying the Victorians". He finds one result - he doesn't really notice which database it was found in. Luckily Undergraduate Bob doesn't have to concern himself with this information - he simply hits the **Request** button. Because he didn't log-in when he first came to the OCUL VDX web site he is prompted for a username & password (possibly his last name, barcode and home institution).
- Behind the scenes the VDX system pulls the information from the remote database and fills in the bibliographic information from his resulting search. This means that Undergraduate Bob doesn't have to type in any of the bibliographic data. He may be asked to fill in or accept additional information, such as copyright compliance, date needed by, and pickup location. He then submits his request.

Note - if he had not found a match for his title, he could have filled in a blank request form.

On the staff side, the request comes automatically into the database (no staff typing to enter user requests).

When staff log into VDX at their workstations Undergraduate Bob's request shows up as one entry in the list of **idle** requests waiting to be authorized. Once authorized (*another VDX Primer brief coming soon*), the request is sent out to a location either chosen automatically from a **rota** generated by rules the institution decides on (*also another VDX Primer brief coming soon*) or the staff member selects a location manually.

- At any time after placing his request, Undergraduate Bob can check the status of his request by logging into the OCUL VDX Web site. He may also receive messages auto-generated by the system via email about the status of his request.

Summary

Advantages to sending users directly to the OCUL VDX web site

1) From the users point of view:

- User friendly, web based, multiple catalogue searching
- Less typing, forms are automatically filled in via the search results
- Opportunity to track their request through the system
- Easy to use across Ontario, logo and procedure will be the same no matter what University library patrons are using

2) From the staff perspective:

- No need for manual entry - data is automatically imported into the system

- Auto populated bibliographic information means fewer data entry errors to complicate placing the order
- No need to maintain web forms

Points to consider

If you opt to use your existing web form rather than hyperlinking to the OCUL VDX Web site you will be responsible for ensuring that the data output is structured in a way that it can be read by the VDX mail_reader.

One way to accomplish this is to re-script your program to structure the fields to match the equivalent VDX fields. Depending on the complexity of your program, this task may range from simply replacing the names of the variables, to a complete re-coding of the fields.

The amount of work involved will vary from institution to institution and we suggest that decisions are made in consultation with the person(s) responsible for creating and/or maintaining the existing web form(s).

Fretwell-Downing's "How to e-mail formatted request into VDX: VDX mail-reader process" documentation can be made available to local systems people.

You will need to train public service staff on the new OCUL VDX Inter-lending Web site.

The OCUL VDX Inter-lending Web site will need to be added to library orientation and user instruction sessions as appropriate.

Look for the future OCUL Primer briefs on how to implement a link to the OCUL VDX web site via the OPAC and or library web site and how to get your OCUL VDX Inter-lending Web page coding and or logo.

Authors: Sue McGillivray
Carol Stephenson
Shane Chan
June 6, 2002, revised July 18, 2002