VDX ILL Email: User Guide

Last Updated: 30 October 2013

Support:

Australia: 1300 260 795 (Local call cost in Australia)
Email:
support-amlib@oclc.org
Amlib Help Desk (TOPDesk):
https://servicedesk.oclc.org/tas/public/
OCLC Amlib Document Portal:
https://www.oclc.org/support/services/amlib.en.html

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Australia: 1300 260 795 (Local call cost in Australia)
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www.oclc.org/en-AU/

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OVERVIEW

Amlib VDX ILL Email allows for the receipt of a structured email sent from OCLC's *VDX Inter-Library Loans System*.

This structured email creates Stockitem and ILL records within the *Amlib* client, as well as creating a reservation for the borrower as entered into *VDX*. This user guide covers how to configure and run the *Amlib VDX ILL Email* solution.

For information on how to install the required programs, see the **Amlib VDX ILL Email Installation Guide**.

The *Amlib VDX ILL Email* is available to all *Amlib* libraries that currently use the *OCLC VDX Inter-Library Loans System*, at no additional cost to the library.

The solution is available in two modes – automated Service or manual Client.

When manually run by an operator, the *Amlib VDX ILL Email client* will:

1. Allow the automatic creation of a temporary Stockitem record on a requesting Amlib library's database when the library has requested an item from another library via *VDX*

2. Allow the automatic creation of a reservation on the temporary holding record in *Amlib*

3. Allow the automatic creation of a corresponding ILLs record in *Amlib* Applications

The *Amlib VDX ILL Email Service* (run via the *Amlib Configuration Manager*) will:

1. Require a schedule to be set and activated using the *Amlib Configuration Manager* (see below)

2. Allow an overall scheduled processing time and cycle to be set

3. As per the schedule, allow the automatic creation of a temporary Stockitem record on a requesting Amlib library's database for any request placed on behalf of a patron by library staff on the OCLC *VDX ILL system*

4. Allow the automatic creation of a reservation on the temporary holding record in *Amlib*

5. Allow the automatic creation of a corresponding ILLs record in *Amlib* Applications

Please Note: Users must first have updated their *Amlib* client to *Amlib 5.3*.

Applications

In addition to the *Amlib 5.3* client, users can install one of two applications provided by *OCLC* to implement the interface:

1. **Amlib VDX ILL Email Client**

   - When run by an operator, this application is responsible for checking for messages sent to a pre-configured email address
   - Installed by the **AmlibVDXILLEmail.msi** on the user's *Amlib* PC

2. **Amlib VDX ILL Email Service**

   - This application runs as a *Windows* Service (the Service is responsible for automatically executing the processes according to the schedule defined *Amlib Configuration Manager*)
   - Installed by the **AmlibVDXILLEmailService.msi** on the server

In addition to the above applications, there is a **separate** *Amlib Configuration Manager* application (installed at the same time) which is used to configure the connection between the selected *Amlib VDX ILL Email* application(s) and the *Amlib* SQL databases.
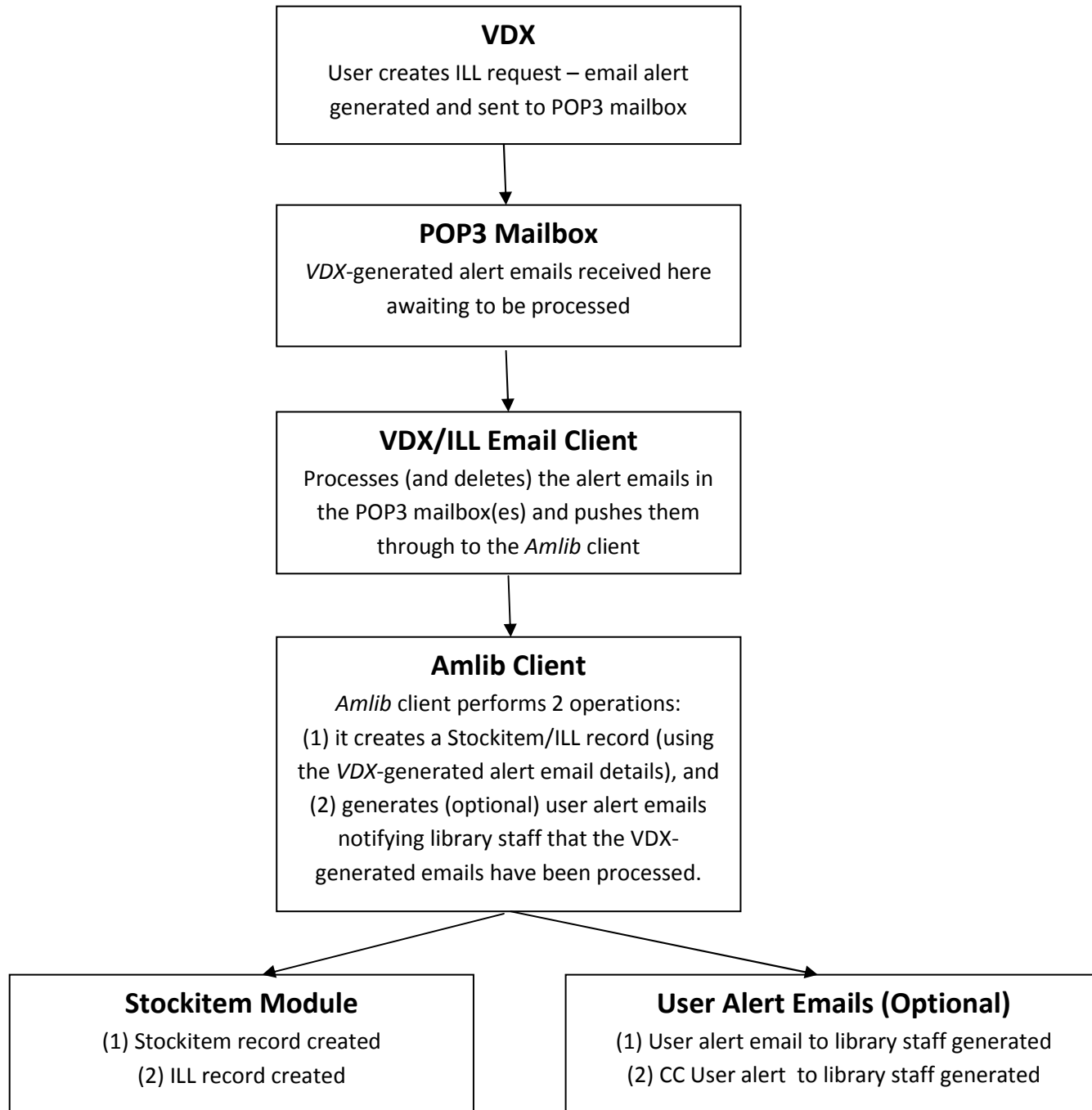
Certain *Amlib* client settings also need to be enabled and configured as part of the *Amlib VDX ILL Email* setup.

IMPORTANT: Configuration of the *Amlib VDX ILL Email* application/service requires the creation of **Location-specific POP3 email user accounts (mailboxes)** within the *Amlib* client – see Amlib Supervisor Settings. Once set-up, these location-specific *Amlib* mailbox addresses **MUST** be added into the *State Library of WA* (*SLWA*) *VDX* system against the specific user locations. After entering their email settings in the *Amlib* client, users should contact Sandra Jones (sandra.jones@slwa.wa.gov.au) at *SLWA* providing the email addresses to be added to their *VDX* configuration. *SLWA* will arrange for these configuration changes on their behalf (which will also include testing).

Please Note: It is not possible to use a standard *Exchange* mailbox with the *Amlib VDX/ILL Email* application/service.

IMPORTANT: The POP3 mailboxes created should NOT use **SSL** as this system does not support **SSL**. This VDX ILL Email program will only be within your internal network so there is no security risk.

Due to specific VDX workflow requirements, the *Amlib VDX ILL Email* application/service is currently only available for use by WA users.
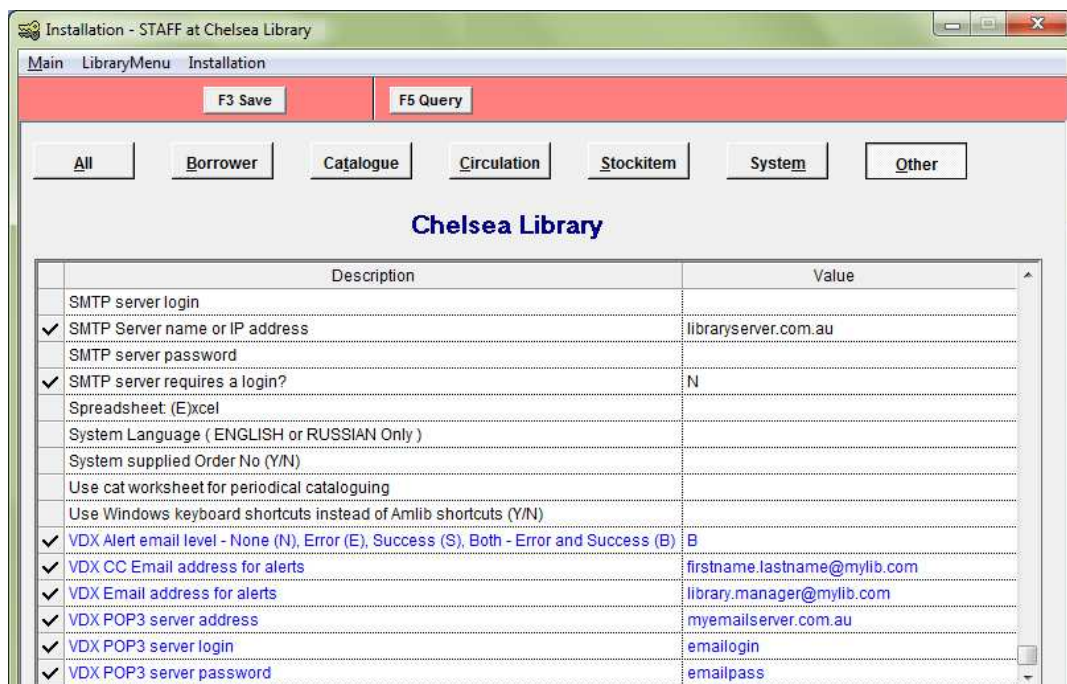

```
┌─────────────────────────────────────────┐
│                   VDX                     │
│   User creates ILL request – email alert  │
│   generated and sent to POP3 mailbox      │
└─────────────────────────────────────────┘
                    │
                    ▼
┌─────────────────────────────────────────┐
│              POP3 Mailbox                 │
│   VDX-generated alert emails received here│
│        awaiting to be processed           │
└─────────────────────────────────────────┘
                    │
                    ▼
┌─────────────────────────────────────────┐
│           VDX/ILL Email Client            │
│   Processes (and deletes) the alert emails│
│   in the POP3 mailbox(es) and pushes them │
│      through to the Amlib client          │
└─────────────────────────────────────────┘
                    │
                    ▼
┌─────────────────────────────────────────┐
│               Amlib Client                │
│     Amlib client performs 2 operations:   │
│   (1) it creates a Stockitem/ILL record   │
│   (using the VDX-generated alert email    │
│   details), and (2) generates (optional)  │
│   user alert emails notifying library     │
│   staff that the VDX-generated emails     │
│   have been processed.                    │
└─────────────────────────────────────────┘
          │                       │
          ▼                       ▼
┌──────────────────────┐ ┌──────────────────────────┐
│  Stockitem Module     │ │ User Alert Emails         │
│                       │ │ (Optional)                │
│ (1) Stockitem record  │ │ (1) User alert email to   │
│     created           │ │     library staff         │
│ (2) ILL record created│ │     generated             │
│                       │ │ (2) CC User alert to      │
│                       │ │     library staff         │
│                       │ │     generated             │
└──────────────────────┘ └──────────────────────────┘
```

AMLIB SUPERVISOR SETTINGS

IMPORTANT: Configuration of the *Amlib VDX ILL Email* application/service requires the creation of **Location-specific POP3 email user accounts (mailboxes)** within the *Amlib* client. Once set-up, these location-specific *Amlib* mailbox addresses **MUST** be added into the *State Library of WA* (*SLWA*) *VDX* system against the specific user locations. After entering their email settings in the *Amlib* client, users should contact Sandra Jones (sandra.jones@slwa.wa.gov.au) at *SLWA* providing the email addresses to be added to their *VDX* configuration. *SLWA* will arrange for these configuration changes on their behalf (which will also include testing).

Supervisor Parameters

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) table will display

3. From the menu, select **Installation** > **Choose Location** – the Installation screen will display

4. Highlight your main location and then click the **OK** button

5. Select the **Other** tab

6. Scroll down and enter the following *VDX* POP3 settings:

    a. VDX Alert email level - None (N), Error (E), Success (S), Both - Error and Success (B)[1] – enter **N**, **E**, **S** or **B**

    b. VDX CC Email address for alerts[2] – for example: **firstname.lastname@mylib.com**

    c. VDX Email address for alerts[3] – for example: **firstname.lastname@mylib.com**

    d. VDX POP3 server address[4] – for example: **myemailserver.com.au**

    e. VDX POP3 server login[5] –enter the POP3 Server login

    f. VDX POP3 server password[6] – enter the POP3 server password

IMPORTANT: Please refer to the detailed notes overleaf before completing these settings.

> **Important Information about Entering Your POP3 Settings:**
>
> - [1]When the *VDX* email data is processed by the *Amlib VDX/ILL Email* client from the nominated POP3 mailbox (see 5 and 6 below), it is possible for the *Amlib* client to generate a **user alert email** which is sent to selected *library staff* email addresses informing them that the incoming requests have been processed. This setting is used to determine when these user alerts are sent. The following choices are available: None (**N**), Error (**E**), Success (**S**), Both - Error and Success (**B**). If you intend to send out user alerts, then you will also need to configure your SMTP settings (see step 7).
>
> - [2]The CC email address to be used for **user alert emails** to *library staff* (see 1 above). This is **NOT** the same as the POP3 account/email address that is being the used by *VDX* to send ILL request emails and (if used) it **MUST** be configured to use an entirely different email account/email address. If <u>VDX Alert email level - None (N), Error (E), Success (S), Both - Error and Success (B)</u> = **N**, then there is no need to enter a CC email address.
>
> - [3]The primary email address to be used for **user alert emails** to *library staff* (see 1 above). This is **NOT** the same as the POP3 account/email address that is being the used by *VDX* to send ILL request emails and (if used) it **MUST** be configured to use an entirely different email account/email address. If <u>VDX Alert email level - None (N), Error (E), Success (S), Both - Error and Success (B)</u> = **N**, then there is no need to enter a primary email address.
>
> - [4]The hostname or IP address of the mail server hosting the POP3 mailbox that has been set up to receive *VDX* emails for this location
>
> - [5]The user login name for the POP3 mailbox that has been set up to receive *VDX* emails for this location, which will then be processed by the *Amlib VDX/ILL Email* client
>
> - [6]The password for the POP3 mailbox that has been set up to receive *VDX* emails for this location, which will then be processed by the *Amlib VDX/ILL Email* client – a password is required

7. Scroll down and enter the following SMTP settings:

> **Important Information about Entering Your SMTP Settings:**
>
> - Your SMTP server settings are used to *push* **user alert emails** out of the *Amlib* client to library staff
>
> - If you do not intend to setup **user alert emails** for library staff (<u>VDX Alert email level - None (N), Error (E), Success (S), Both - Error and Success (B)</u> = **N**), then there is no need to configure your SMTP settings
>
> - If you already have your SMTP settings defined (for email notifications to users, etc) either on the <u>DEFAULT</u> screen or on the individual location screen, then there is no need to change them

     a. <u>SMTP server name or IP address</u> – for example: **libraryserver.com.au**

     b. <u>SMTP sender email address</u> – for example: **library.staff@mylib.com**

     c. <u>SMTP server requires a login Y/N</u> – for example: **Y**

     d. <u>SMTP server login</u> (only if required) – for example : **serverlogin**

     e. <u>SMTP server password</u> (only if required) – for example : **serverpassword**

8. Click the **F3 Save** button when complete

9. Exit and restart the *Amlib* client for changes to take effect

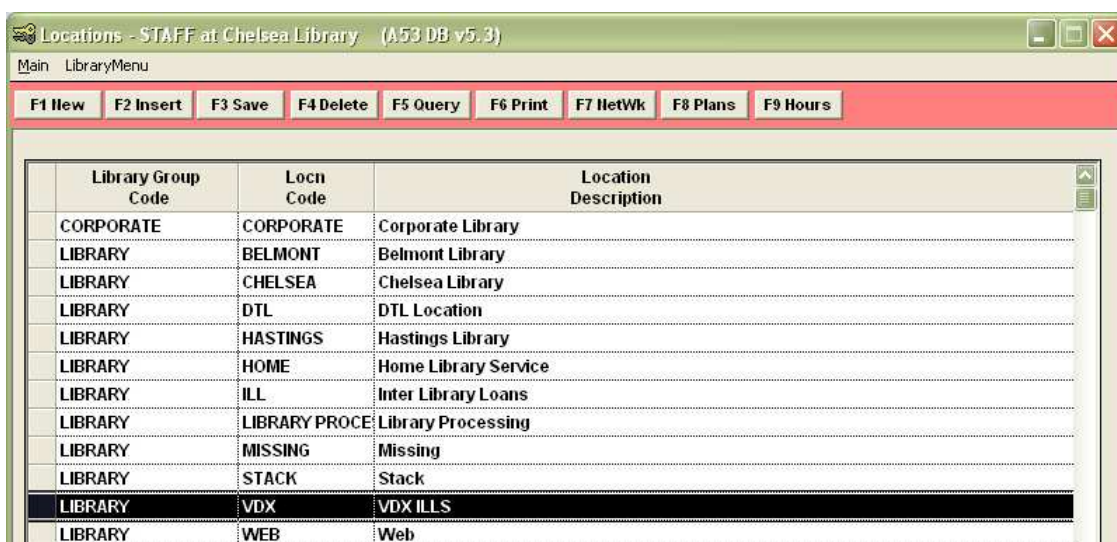## Enter Email Server Details for Individual Locations

Please Note: The *VDX* <u>POP3</u> Email server settings **should not** be entered on the <u>Installation</u> (<u>DEFAULT</u>) screen as they are required to be entered against a *specific* location (even if you only have one circulating location). Libraries operating multiple circulating locations should simply repeat steps 2-9 above to enter the <u>POP3</u> server and user alert email details for each circulating location.

Please Note: When communicating details of these email addresses to *SLWA*, please ensure that you specify which locations they are to be configured against.
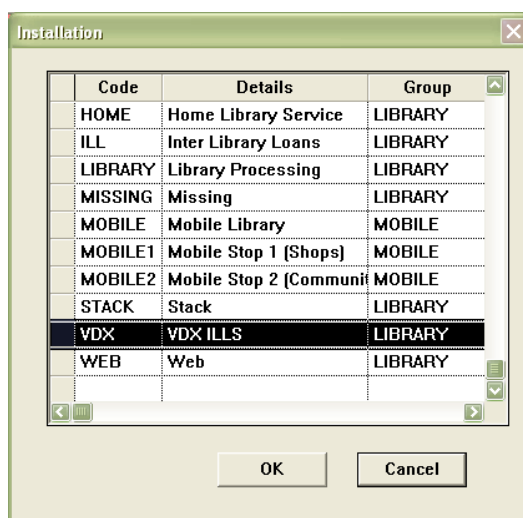
Setup the VDX Location

A new location of **VDX** needs to be created as this will be the Permanent Location used by the temporary Stockitem records created for incoming the *VDX* ILL items.

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Locations-** the Locations screen will display

3. Click the **F1 New** button and enter a new location as below:

   a. Library Group Code – use the same Library Group Code as your main location

   b. Locn Code *must* be **VDX**

   c. Location Description can be whatever you choose – for example: **VDX ILLS**

4. Click the **F3 Save** button

5. Go to **Menu** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display

6. From the menu, select **Installation** > **Choose Location** – the Installation screen will display:

7. Highlight the **VDX** location and click the **OK** button – the Installation (VDX) table will display:
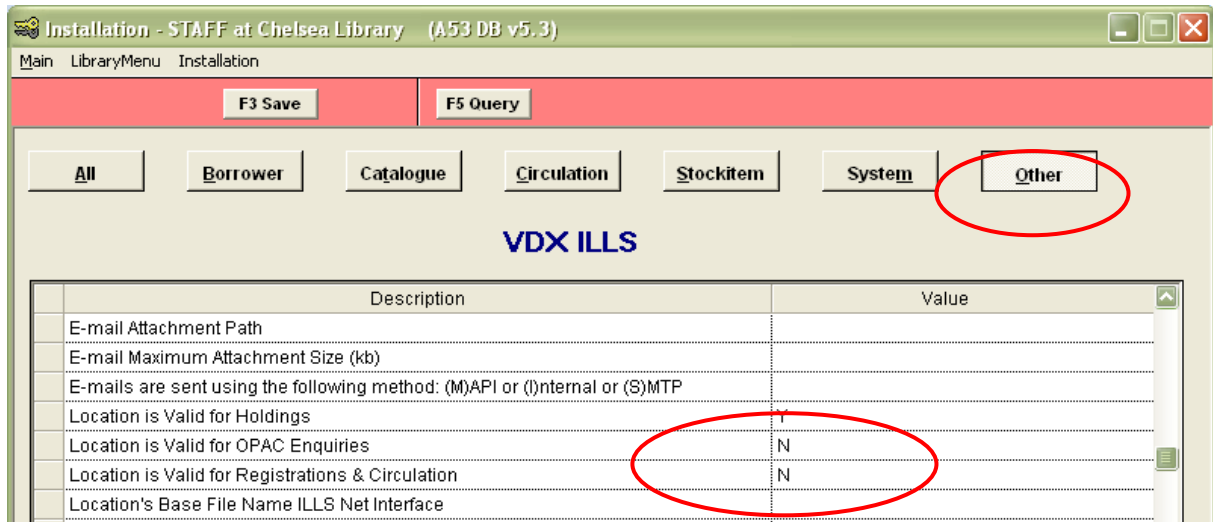
8. Select the **Other** tab and enter the settings:

   - Location is Valid For Holdings: **Y**

   - Location is Valid for OPAC enquires: **N**

   - Location is Valid For Registration and Circulation: **N**

9. Click the **F3 Save** button when complete

10. Exit and restart the *Amlib* client for the new settings to take effect

Group Permissions

Sites that are employing Group Security will need to add extra Supervisor permissions. Non Super Groups will require these permissions to be able to select a processing location:

- **View** permission on another Group's **Parameters**

- **View** permissions on another Group's **Locations**

- **Insert** permission on another Group's **Items**

- **Hold** permission on another Group's **Items**

- **Hold** permission on another Group's **Borrowers**

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Locations** – the Locations screen will display:
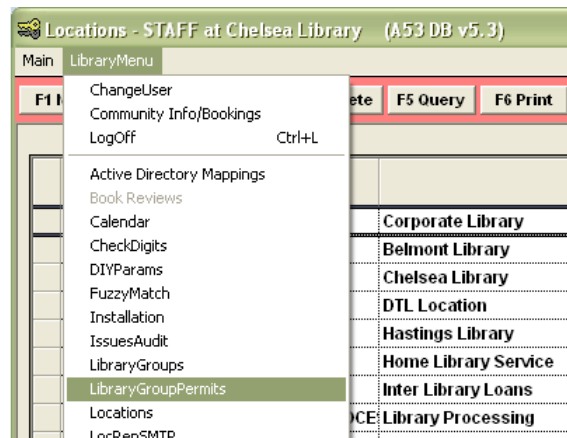
3. Select **LibraryMenu** > **LibraryGroupPermits** – the Library Group Permits screen will display:
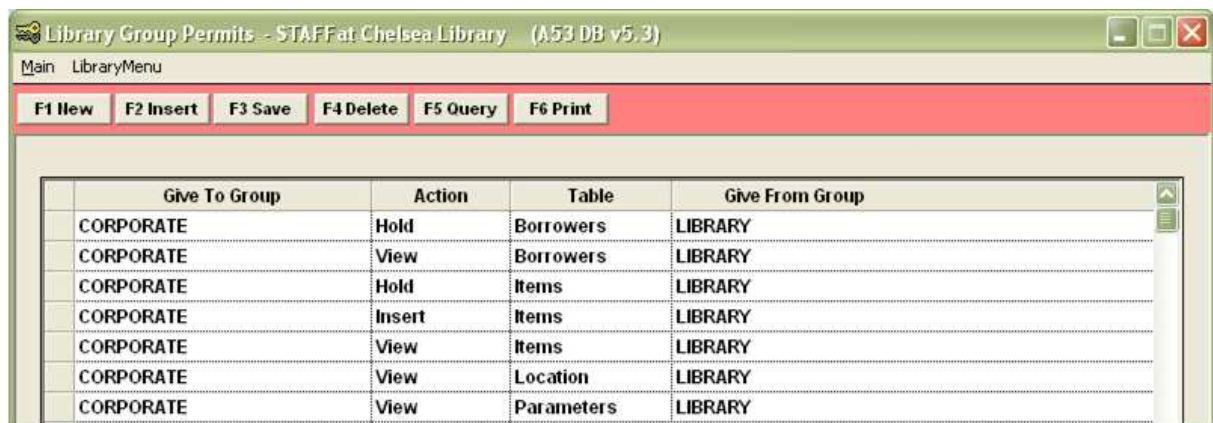
4. Click the **F1 New** button to enter the above settings so the operator is able to process the *VDX* emails for all other locations

5. Click the **F3 Save** button when complete

6. Exit and restart the *Amlib* client for the new settings to take effect

Check Digit Setup

A 14-digit ILLS-related check digit code will need to be setup.

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **CheckDigits** – the <u>Check-digit Calculations</u> screen will display:
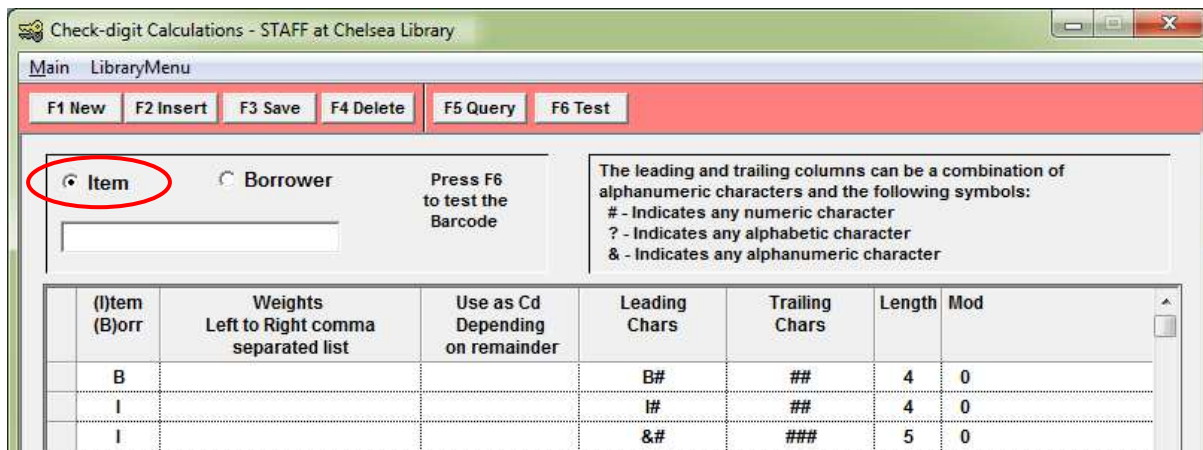
3. Click the **F1 New** button – a new entry will appear in the table

4. Enter the following information to construct a 14-digit check barcode:

    a. <u>(Item) (B)orr</u>: **I**

    b. <u>Leading Chars</u>: **ILLS**

    c. <u>Trailing Chars</u>: **##########**
       (**Please Note:** The above setting is composed of a string of 10 **#**.)
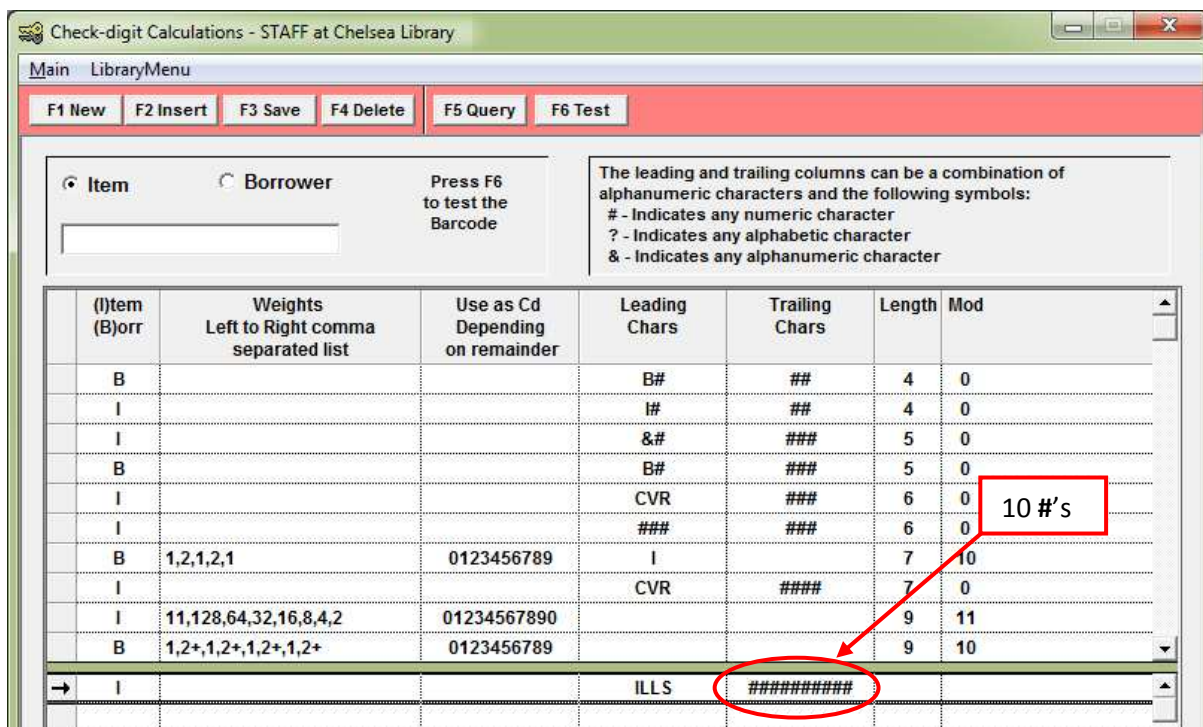
5. Click the **F3 Save** button – a prompt with the following message will display:
A new OFFLINE.INI file has been created for use with Offline Issues, Offline Returns and Offline Stocktake.
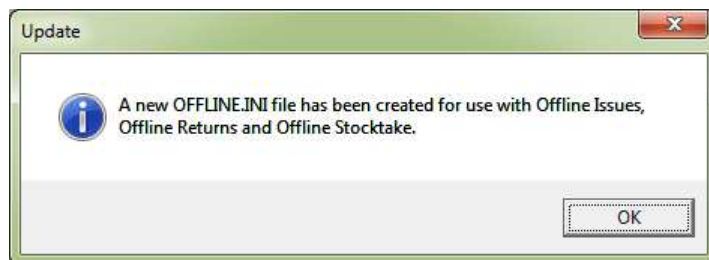
6. Click the **OK** button

7. You will then see a barcode of **14 digits** in length:

(I)tem (B)orr	Weights Left to Right comma separated list	Use as Cd Depending on remainder	Leading Chars	Trailing Chars	Length	Mod
I			&#	###	5	0
B			B#	###	5	0
I			CVR	###	6	0
I			###	###	6	0
B	1,2,1,2,1	0123456789	I		7	10
I			CVR	####	7	0
I	11,128,64,32,16,8,4,2	01234567890			9	11
B	1,2+,1,2+,1,2+,1,2+	0123456789			9	10
B			&&&&&&	&&&&&&	12	0
I			&&&&&&	&&&&&&	12	0
B	1,2+,1,2+,1,2+,1,2+,1,2+	6789012345	2		14	10
I			&&&&&&&	&&&&&&&	14	0
I			ILLS	#########	14	0
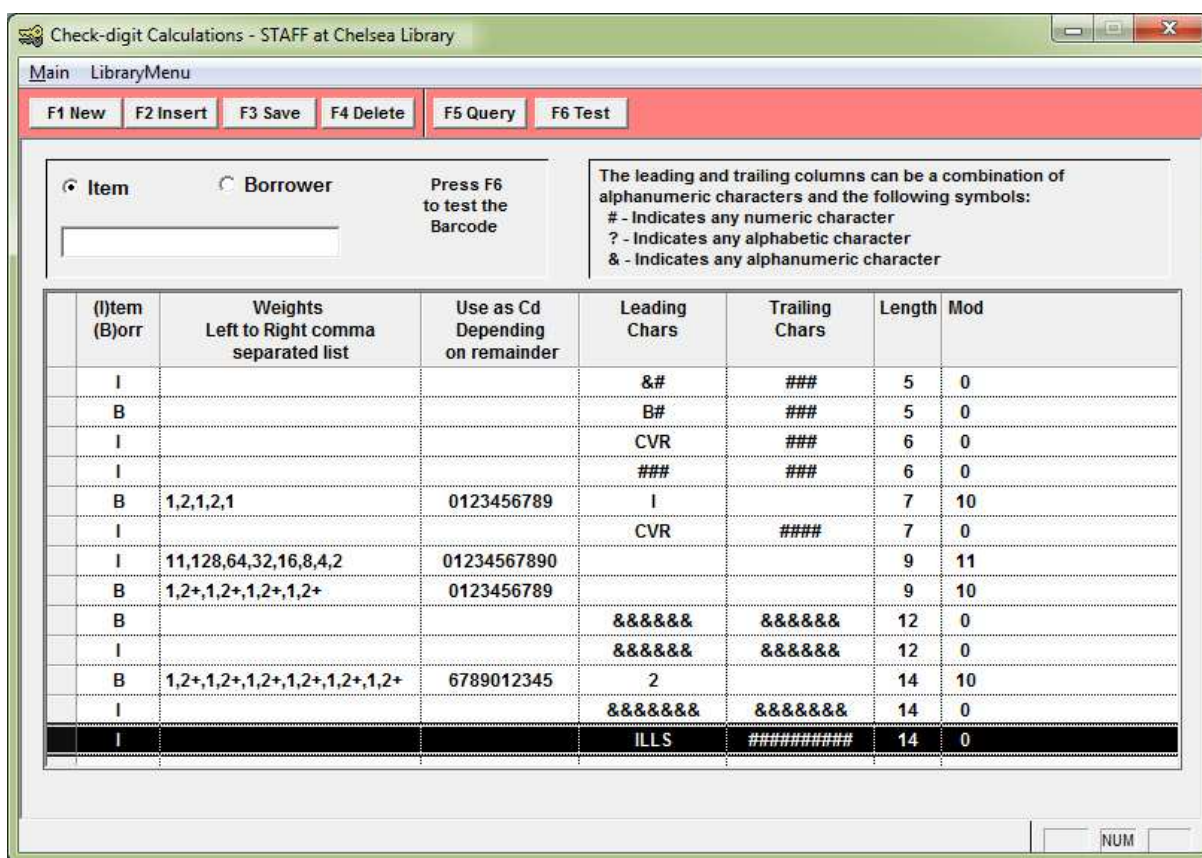
8. Exit and restart the *Amlib* client for the new settings to take effect

STOCKITEM SETTINGS

Stockitem Form Settings

Typically, users will create ILL-specific Form and Stats Codes for use with inter-library loan items. This is particularly true with *VDX/ILL Email* client generated ILL requests, as the Form and/or Stats Code used for lending must have its loan rules altered to allow holds.

Form Codes

1. Launch the *Amlib* client

2. Go to **Main** > **StockItems** > **StockitemForms** – the Form Codes screen will display:
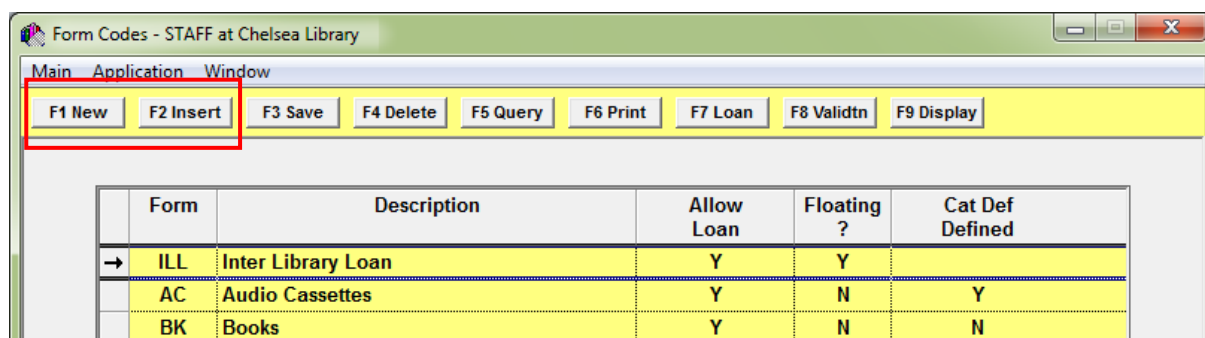
3. If there is no ILL-specific Form Code, then:

    a. Click the **F1 New** or **F2 Insert** button

    b. Enter the following:

        *   Form code – for example: **ILL**

        *   Description – for example: **Inter Library Loan**

        *   Allow Loan: **Y**

        *   Floating: **N**

    c. Click the **F3 Save** button – a prompt with the following message may display: **Remember to check Loan and Validation Parameters for new or changed Form Types.**
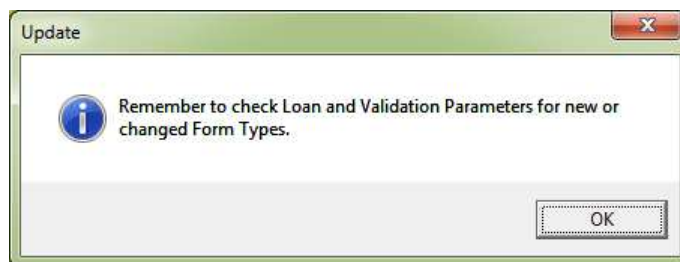
    d. Click the **OK** button

Loan Parameters

WARNING: The Loan Parameters must be adjusted for ALL Borrower Types eligible for ILL requests.

1. Highlight the ILL-related <u>Form</u> code and click the **F7 Loan** button
   Please Note: If a prompt with the following message displays: **This installation CURRENTLY uses the Stockitem Stats Code and Borrower Type as loan combinations.** then the user should apply these instructions to the ILL-related Stockitem <u>Stats Code</u> (see following section).
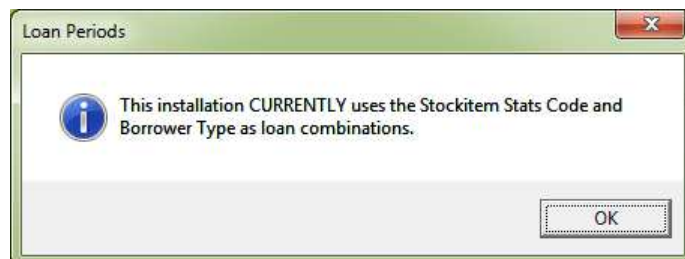
2. The <u>Loan Parameters and Borrower Types</u> screen will display:
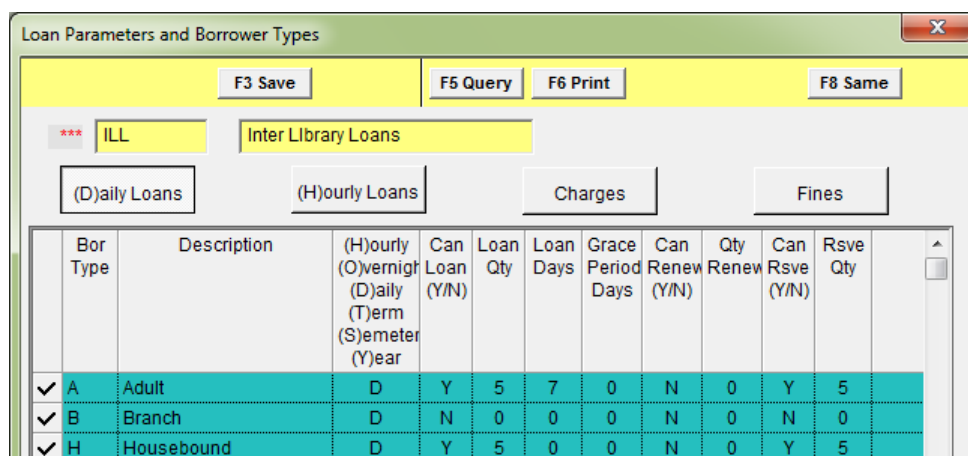
3. Check/enter the following settings:

   a. <u>(H)ourly (O)vernight (D)aily</u>: this is usually set to **D** (for Day)

   b. <u>Can Loan (Y/N)</u>: **Y**

   c. <u>Loan Qty</u>: set the minimum number of allowable interlibrary loans – for example: **5**

   d. <u>Loan Days</u>: set the default number of loan days for ILL items – for example: **7**

   e. <u>Grace Period Days</u> – for example: **0**

   f. <u>Can Renew (Y/N)</u> – for example: **N**

   g. <u>Qty Renew</u> – for example: **0**

   h. <u>Can Rsve (Y/N)</u>: MUST be set to **Y**

   i. <u>Rsve Qty</u>: should match the <u>Loan Qty</u> – for example: **5**

4. Click the **F3 Save** button when complete

Stats Codes

1. Go to **Main** > **StockItems** > **StockitemStatsCodes** – the Form Codes screen will display:
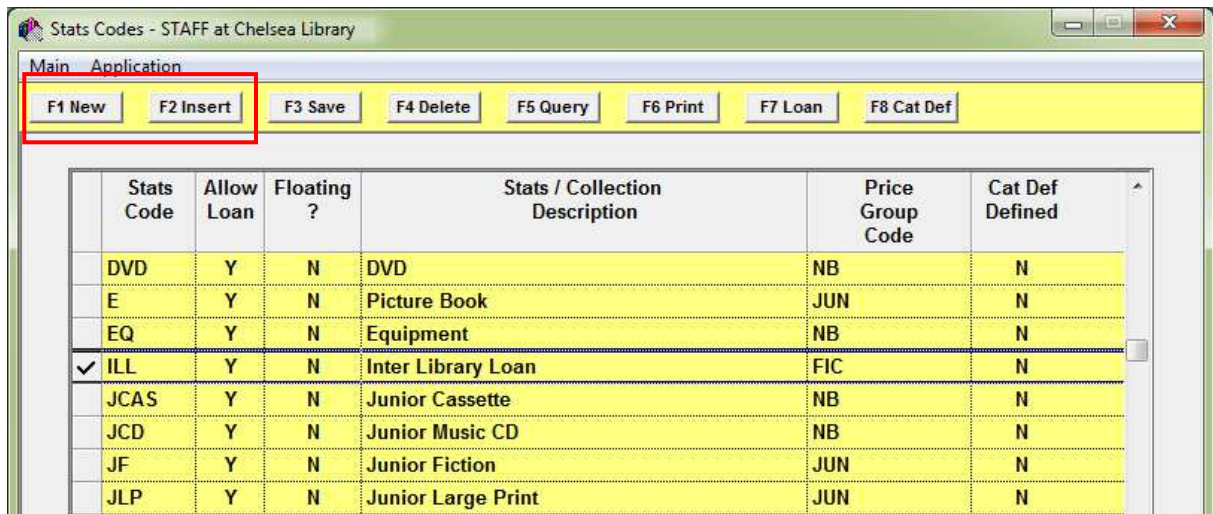
2. If there is no ILL-specific Stats Code, then:

    a. Click the **F1 New** or **F2 Insert** button

    b. Enter the following:

        • Stats Code – for example: **ILL**

        • Allow Loan: **Y**

        • Floating: **N**

        • Stats / Collection Description – for example: **Inter Library Loan**

        • Price Group Code – this must match a corresponding code on the Stats Group Codes screen (**Application** > **StockStatsGroup**)

    c. Click the **F3 Save** button – a prompt with the following message may display: **Remember to check Loan and Validation Parameters for new or changed Form Types.**
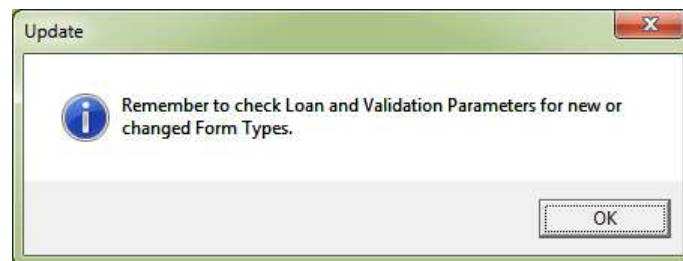
    d. Click the **OK** button

ILL Default Settings

1. Launch the *Amlib* client

2. Go to **Main** > **StockItems** > **Stockitem** – the Stockitem screen will display

3. From the menu, select **Item** > **ILLS** – the Interlibrary Loans screen will display:

4. Ensure that the following Item Create Defaults are set:

   - Form: set the default Form code to be used for **all** ILL items (including *VDX*) – for example: **Form = ILL**

   - Stats: set the default Stats code to be used for **all** ILL items (including *VDX*) – for example: **Stats = ILL**

5. Click the **F6 UpdDef** button when complete

The *Amlib* client setup is now complete.

SCHEDULE – SET A SCHEDULE TO AUTOMATICALLY PROCESS VDX REQUESTS

When a request is placed on *VDX*, a structured email is sent to the POP3 mailbox configured in the **Supervisor** > **Installation** setting POP3 server login.   The *Amlib Configuration Manager* scheduler can check this mailbox according to a predefined schedule and push the request/s into *Amlib*.

1. Launch the *Amlib Configuration Manager* on the server

2. Select the VDX Email tab

3. Using the dropdown boxes enter your preferred cycle for automatic processing. We recommend processing on a **Daily** basis at intervals during the day, for example this schedule is set up to process once every hour, on the hour.   Click the **Calculate** button to see what time the next scheduled run is due
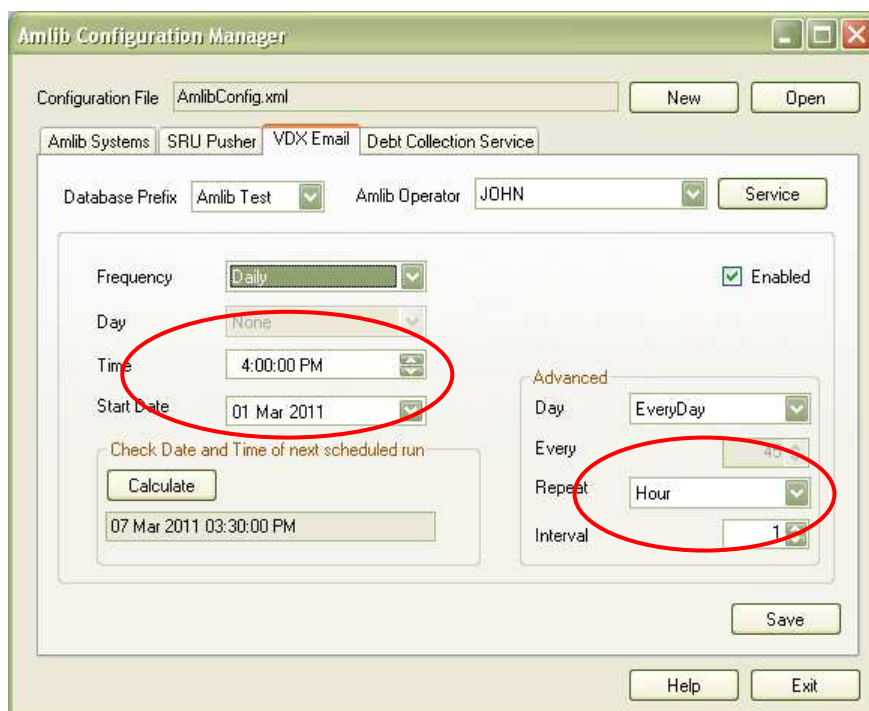
4. Ensure the **Enabled** box is ticked
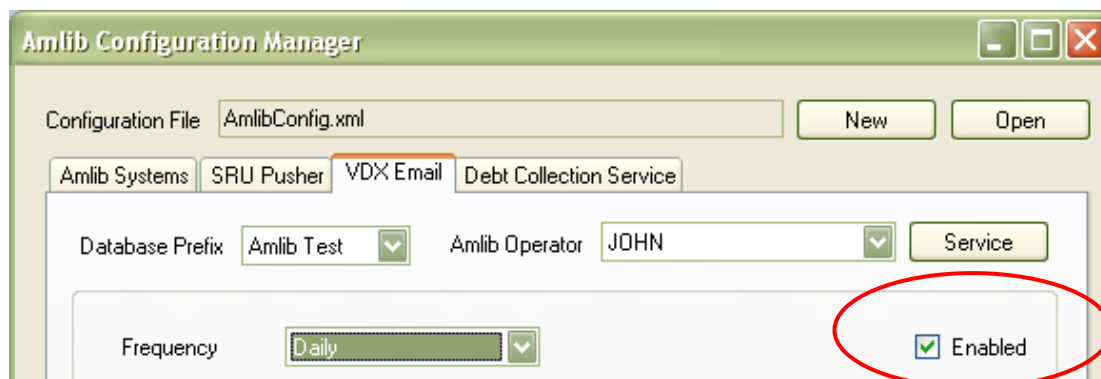
5. Click the **Service** button – the Service prompt will display

6. Ensure the Service Status is **Running**
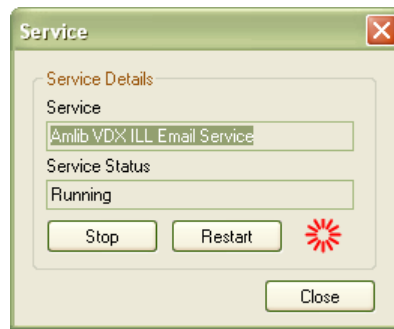
7. If not, click the **Restart** button and then the **Close** button

8. Use the **Save** button to save all settings and the **Exit** button to close the *Amlib Configuration Manager*. The service only needs to be scheduled once and will then process any emails that come from *VDX* to the configured mailboxes at this interval.
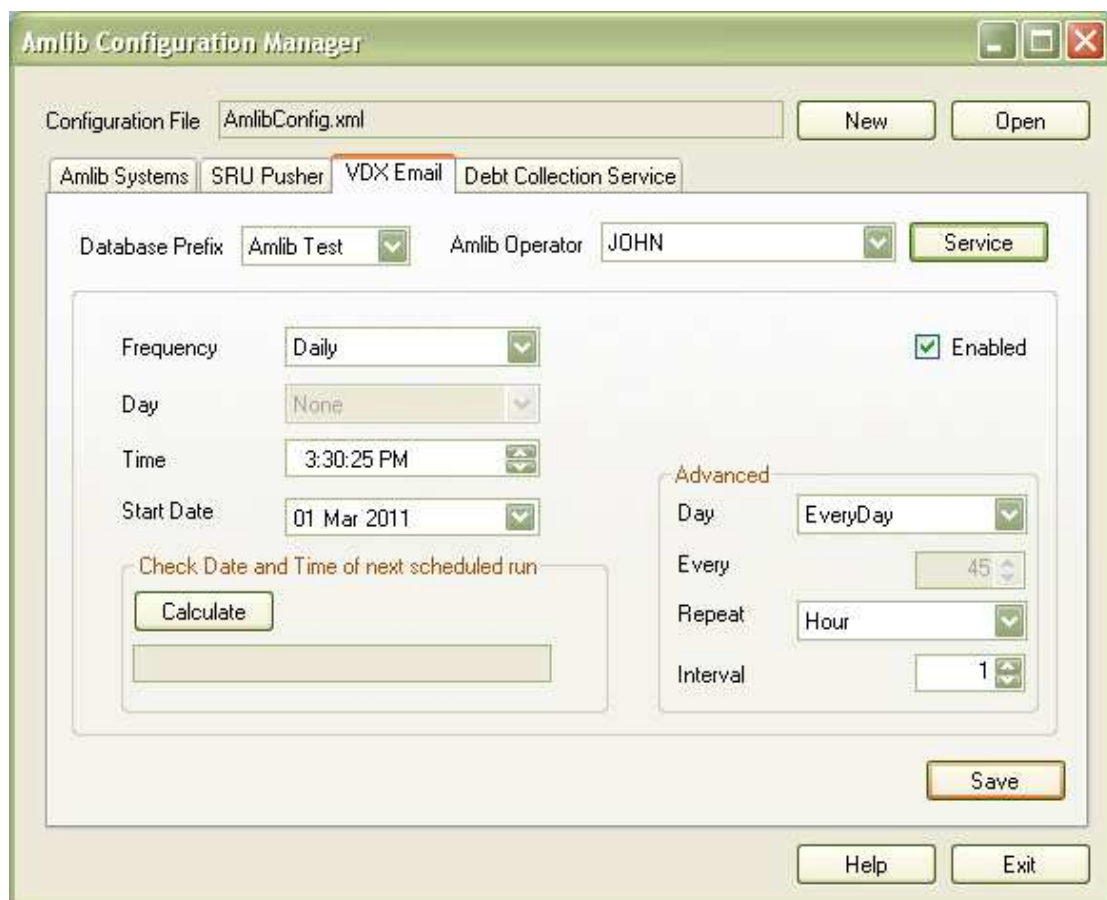
9. As ILL requests are pushed into *Amlib* according to the schedule, notification emails can be sent to library staff using the email addresses set in the *Supervisor > Installation* screen <u>VDX Email address for alerts</u> and <u>VDX CC Email address for alerts</u> address fields (see <u>Amlib Supervisor Settings above</u>)

MANUAL – OPTION TO PROCESS EMAILS MANUALLY

Rather that set up an automatic schedule to create the Stockitems, ILLS and Reservations in *Amlib*, some libraries may choose to run this process manually and not set a schedule as above.

Please Note: If your library does decide to operate this way, it is very important to ensure the *Automated* Service is disabled on the server. This will prevent requests from being duplicated in *Amlib*.

1. Launch the *Amlib Configuration Manager*

2. Click on the <u>VDX Email </u>tab
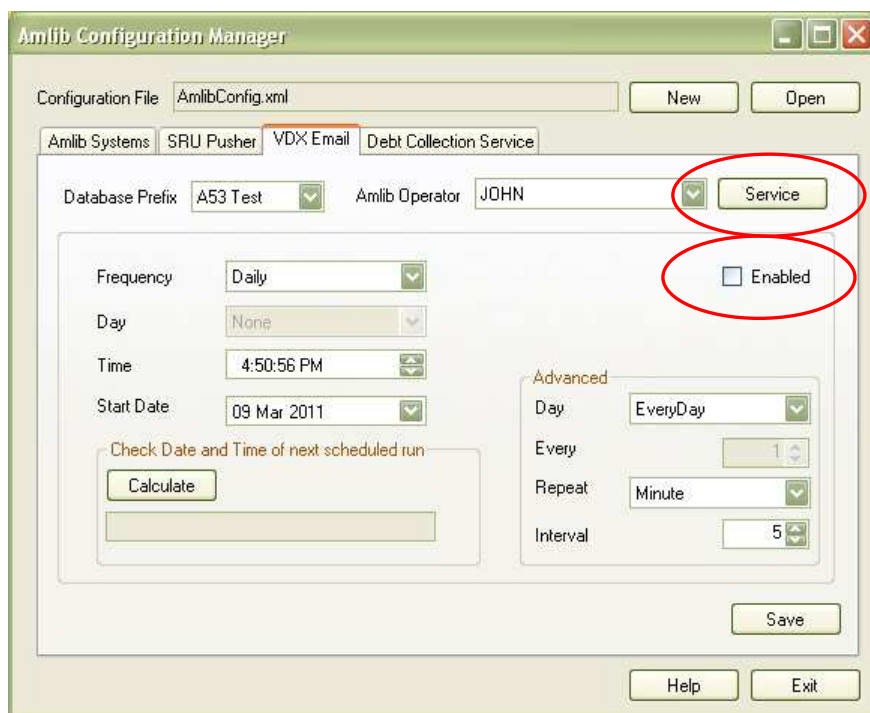
3. **Un-tick** the <u>Enabled</u> button

4. Click the **Service** button – the <u>Service</u> prompt will display:

5. Click the **Restart** button

6. Click the **Close** button when complete

Import Awaiting VDX Requests into Amlib on a Manual Basis

1. Launch the **AmlibVDX InterLibrary Loan Email** program from your *Start* menu, or from *Windows* **Start** > **All Programs** > **AmlibVDXILLEmail** > **Amlib VDX InterLibrary Loan Email**

2. The <u>Amlib Login</u> screen will display: type in a valid *Amlib* **User Name** and **Password** and selected the **Live** database

3. Click the **OK** button
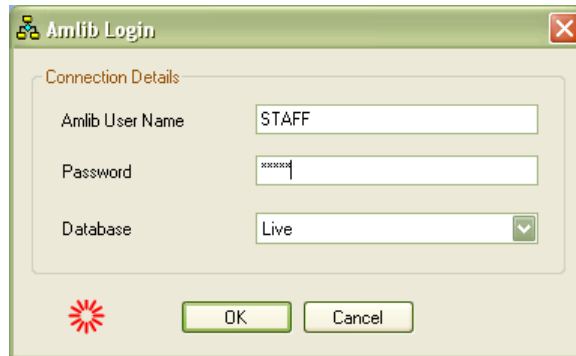
4. The <u>Please select a location screen</u> will display: the client will default to the *Amlib* user's default login location – to select this, click the **OK** button (or highlight a different login and click the **OK** button)
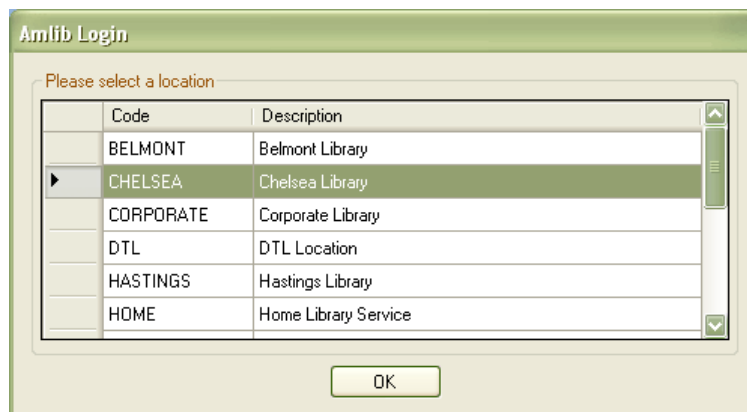
5. The <u>Email Processing</u> screen will display:
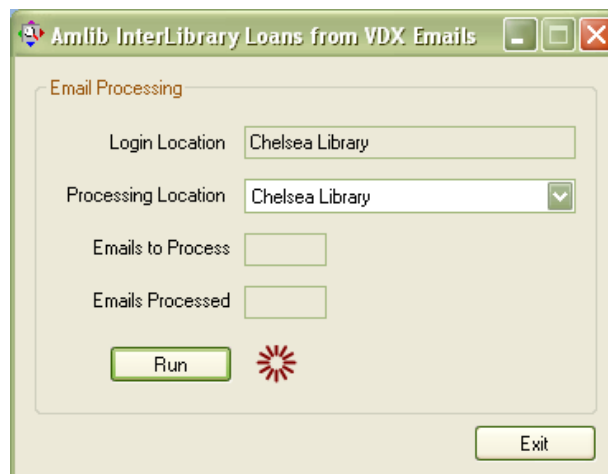
6. Select your <u>Processing Location</u> from the dropdown (for example: **Chelsea Library**): this is the location whose mailbox you want to process as per the setting in **Supervisor** > **Installation** ><u>VDX POP3 server login</u>. As mentioned above, you may have a different POP3 server login for each library branch if you have a different *VDX* login for each branch

7. Click on the **Run** button to process the awaiting *VDX* ILLs requests for the *selected* location into *Amlib* Stockitems, ILLs and Reservations

8. Once completed, a confirmation prompt will display, stating: **All Emails processed.**

9. The number of <u>Emails Processed</u> will be displayed on the <u>Email Processing</u> screen
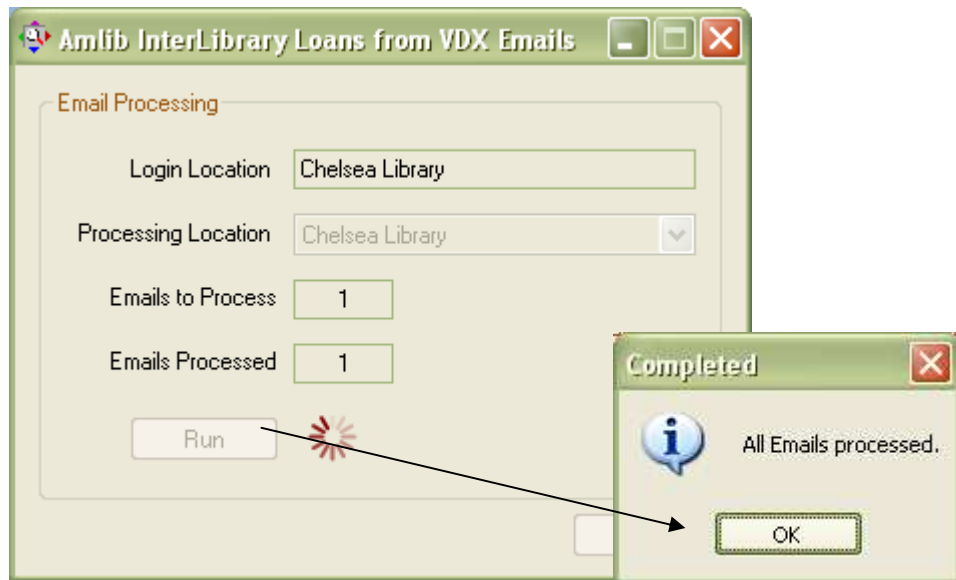
10. One operator can process the emails for all different locations by selecting the next processing location and clicking on the **Run** button, repeating until all locations have been processed

11. When the *Amlib VDX ILL Email* client is run and emails pushed into *Amlib*, a notification email can be sent to library staff using the email addresses configured in the *Supervisor > Installation* screen <u>VDX Email address for alerts</u> and <u>VDX CC Email address for alerts</u> address fields (see <u>Amlib Supervisor Settings above</u>):
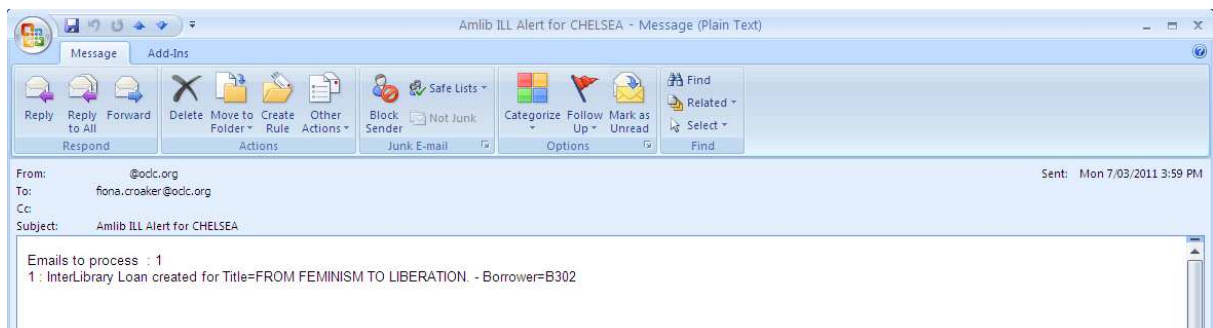
CREATE THE RESERVATION IN VDX

VDX Version 4.X
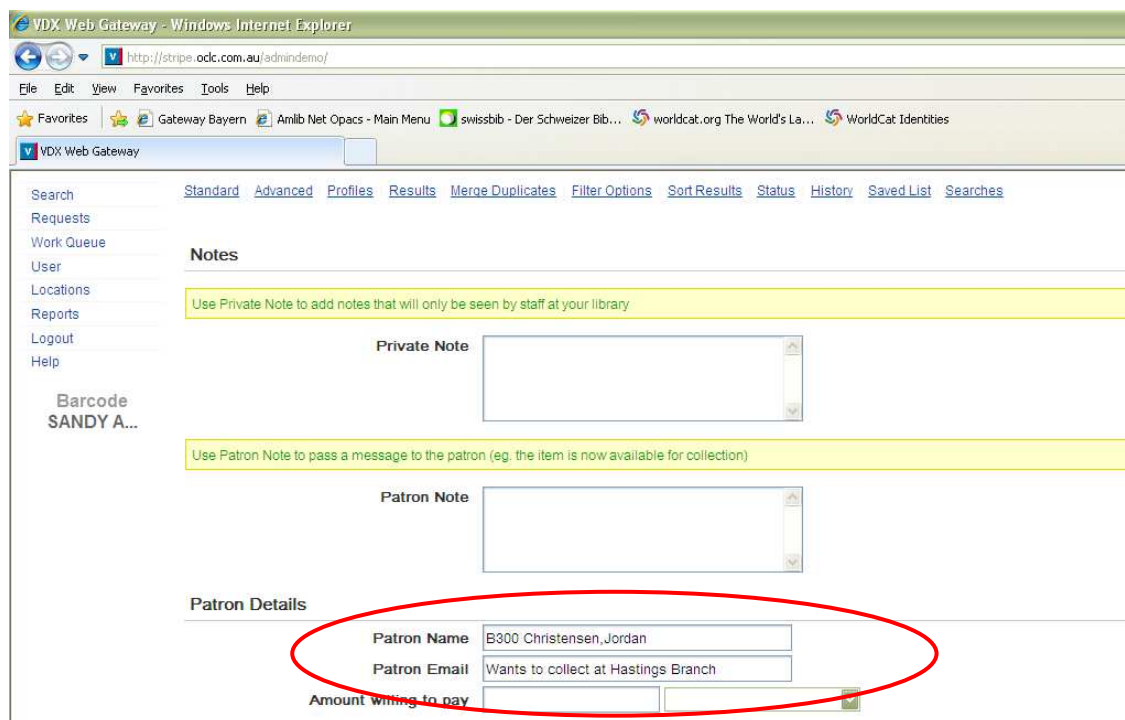
1. Log into *VDX*

2. Search for the title

3. Click **Request**

4. Fill out the form as per usual ensuring the following fields are completed:

   - **Patron Name** field: the patron's *Amlib barcode* must be entered into this field to have the reservation automatically created

   - ****Patron Email** field: this field is used to transfer short notes, such as change to the Pickup locations (**Please Note:** 99 character limit)

Please Note: Patron barcode **must** be entered as the first element in **Patron Name** field in order to have the reservation created automatically in *Amlib* ILLs screen.   If necessary it is possible to enter additional information into the **Patron Name** field to be recorded in recorded in *VDX*, although only the barcode is mapped to *Amlib*.

 In this case the field must be filled in as:

   - <barcode><space><surname><comma><given name> – for example **B300 Wilson,Bruce**

Please Note: There may be a delay between requesting an item in *VDX* and the email being available in the target mailbox.

**Please Note: The use of the <u>Client Email</u> field as a notes field limits its ability to be used for end-user alerts. Its use should be discouraged where possible. It is possible for patrons to change the

Location Pick-up for any reservation (including ILLs) via the *NetOpacs* at any point prior to the patron being sent a Reservation collection notice (done via *RepReservations* with Update Status = **Y**).

WARNING: If the Title and/or Author fields in the *VDX* client screen exceed 250 characters, then these requests will "fail" when processed by the *Amlib VDX/ILL Email Client* (due to the limits on these fields in the Stockitem screen). Users may truncate overlong Titles and Authors in the *VDX* – environment before placing the request.

Please Note: The supplying library will receive the same (altered) request information, which may affect their ability to fulfill the request.

RECORD DISPLAY IN AMLIB

Stockitem Record

ILL Record

- VDX ILL Number
- Supplying library defaults to VDX
- Requesting / Collection at library as per Supervisor settings
- Comments from the VDX Patron Email field
- Requesting borrower from the VDX Patron Name field

Reservation Record

Reservations are created with a default Status of **ILLS**:

- Select **Item** > **CurrentReserves** on the Stockitem screen of the ILL item to access the Stockitem Reservations screen for these details:


Please Note: It is possible for patrons to change the Location Pick-up for any reservation (including ILLs) via the *NetOpacs* at any point prior to the patron being sent a Reservation collection notice (done via *RepReservations* with the Update Status on the notice set to **Y**).

Staff can also change the Location Pick-up point (*at any time*) by using the **F7 CollLoc** button on the Stockitem Reservations screen above.
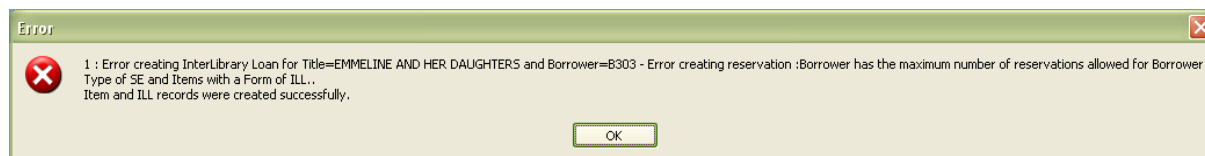
Amlib Exception Messages

During manual processing, or in the alert emails, exception messages may be seen under certain conditions:

- If a Borrower has **exceeded** their reservation limit an error message will appear. The Stockitem and ILL records will still be created, but no reservation will be created. Click the **OK** button
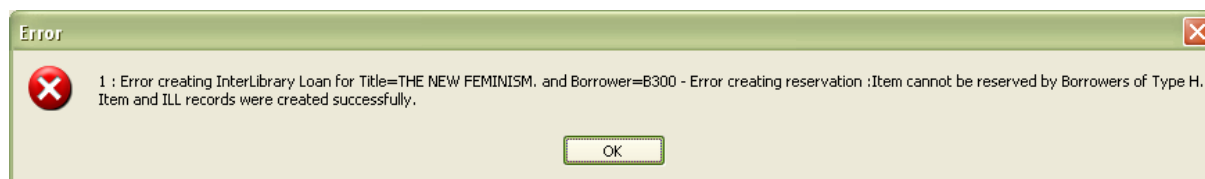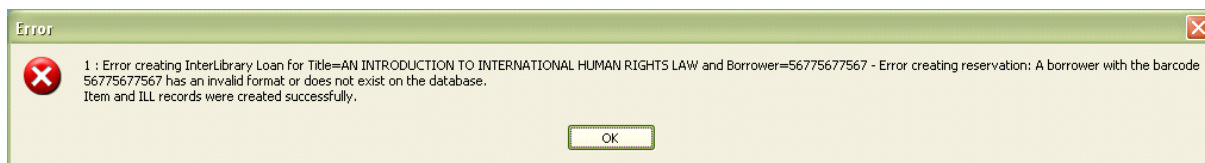

- If a reservation **cannot be made** by that borrower type, an error message will appear. The Stockitem and ILL records will still be created. Click the **OK** button
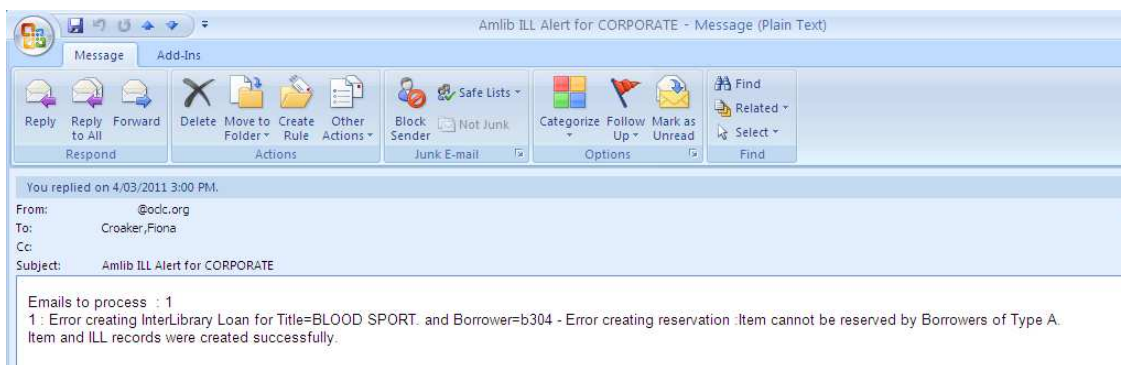
- If an **invalid borrower barcode** is entered, an error message will appear. The Stockitem and ILL records will still be created. Click the **OK** button

Email alert with exception:

1. The reservation can be dealt with by noting the patron and item details from the alert email or error notification and:

    - **Allowing** the request by placing the reservation manually and overriding the reservation screen message; or

    - **Disallowing** the request and cancelling the order in *VDX*

2. Libraries may wish to increase the number of reservations permitted using **Main** > **Stockitem** > **Stockitem Forms** screen:

    a. Highlight the **ILL** Form and select the **F7 Loan** button – the Loan Parameters and Borrower Types screen will display:
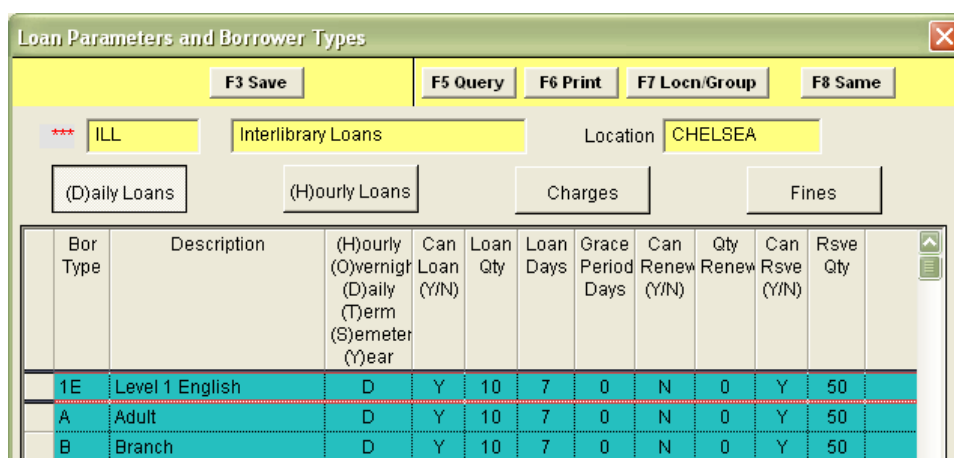
    b. Update the Can Rsve (Y/N) and Rsve Qty columns accordingly

    c. Click the **F3 Save** button when complete