Option to process emails manually

In lieu of setting up automatic schedules to create the Stockitems, ILLs and Reservations in Amlib, learn how 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.

**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 VDX Email tab
3. **Un-tick** the Enabled button
4. Click the Service button – the Service prompt will display:

![Amlib Configuration Manager](https://help.oclc.org/Library_Management/Amlib/VDX_ILL_Email/050Option_to_process_emails_manually)
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 Amlib Login screen will display: type in a valid **Amlib User Name** and **Password** and selected the **Live** database
3. Click the **OK** button

4. The Please select a location screen 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 Email Processing screen will display:

6. Select your Processing Location from the dropdown (for example: **Chelsea Library**): this is the location whose mailbox you want to process as per the setting in **Supervisor > Installation > VDX POP3 server login**. 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 Emails Processed will be displayed on the Email Processing 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 VDX Email address for alerts and VDX CC Email address for alerts address fields (see *Amlib Supervisor Settings* above):

![Email Processing Interface](image)

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

![Reservation Form](image)
Note: 99 character limit)

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 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

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

Note: The use of the Client Email 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).

Caution: 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.

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