

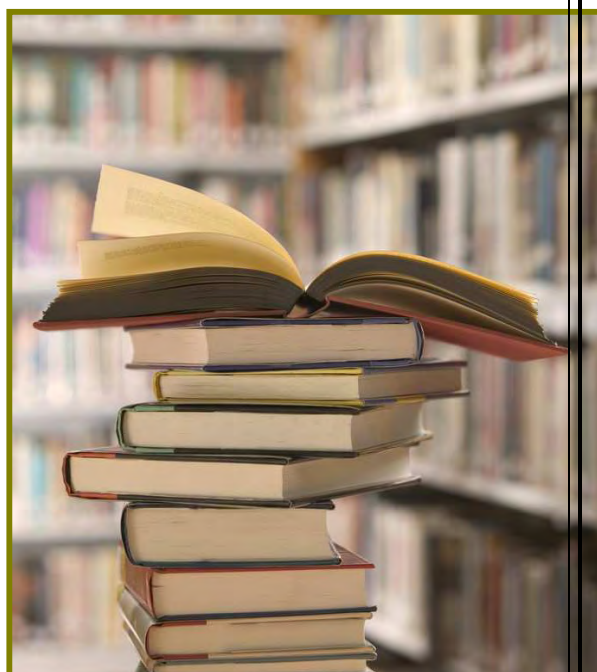


EAST GWILLIMBURY  
PUBLIC LIBRARY

# User Guide

for Patron Self-Serve Interlibrary Loan

from library,  
home, work  
or school...  
from  
anywhere  
there is  
internet  
access



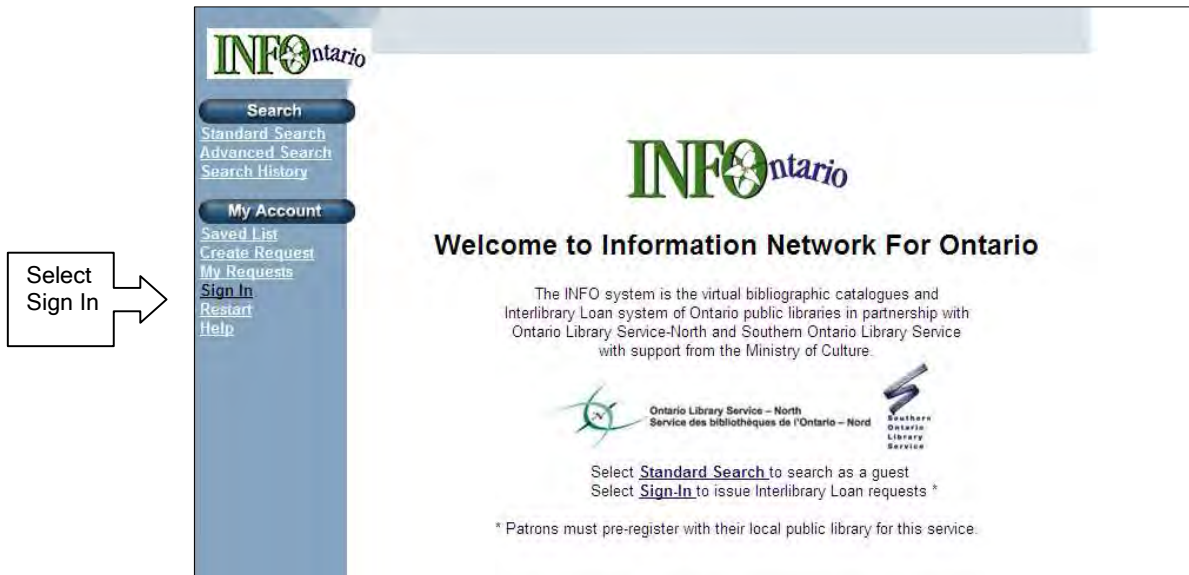
Place Interlibrary Loan  
requests using the INFO  
patron interface...

anytime, anywhere...

INFOntario  
http  
@

## Sign-In Procedure

1. Use your browser 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 and password. Passwords are case sensitive so be aware of upper or lower case entry. You can change your password.

**NOTE:** User ID and password are provided to you by library staff when you register with your library for a zPortal account.

- Authentication Service: Select the name of the Authentication Service you have a registered user account with from the drop down menu. Your Authentication Service is East Gwillimbury Public Library.



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

The screenshot shows the 'Sign-in' form. It has a blue header with the text 'Sign-in'. Below the header, there are three input fields: 'User ID:' with the value '123', 'Password:' with masked characters '••••', and 'Authentication Service:' with a dropdown menu showing 'Hanover Public Library'. At the bottom of the form is a blue button labeled 'SUBMIT'.

*Example sign-in of a user registered at Hanover Public Library*

## General Screen Navigation

- First screen after log-in is always the **Standard Search** screen
- Left panel buttons are to choose an activity
- F11 toggles your browser tool bars On/Off at top of screen in Internet Explorer
- Browser **BACK** button is not used in INFO

The screenshot shows the 'INFO Ontario' logo in the top left. Below it is a vertical menu with links: Search, Standard Search, Advanced Search, Search History, My Account, Saved List, Saved Searches, Create Request, My Requests, Search Profiles, Account Details, Sign Out, and Help. The main content area is titled 'Search / Standard Search' and contains a text box for 'Type the word or words you want to search...' with a 'GO!' button and a link to 'Advanced Search'. Below this is a 'Standard Search' section with a 'Current Profile' dropdown menu set to 'INFO Union Catalogue [shared]', a 'Search Term' text box, and a 'Collections' section with a link to 'Advanced Search'. The 'Searchable Collections' section lists 'INFO Union Catalogue' with a checked checkbox and links for 'Select All' and 'Deselect All'.

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

## Selecting a Search Profile

- Users should always start a search with their logical “get started” profile. You only need to select a different profile in the list IF you do not get the desired results from your “get started” profile.
- Open the Current Profile drop down list and select the one that best represents your geographic area or contains your home library’s catalogue. Your best “get started” profile is **SOLS Simcoe/York [shared]**.

This screenshot shows the 'Standard Search' section with the 'Current Profile' dropdown menu set to 'SOLS Toronto/Kawartha/401 Area [shared]'. A callout box with an arrow points to the dropdown arrow, with the text 'Open Current Profile List'. Below the 'Searchable Collections' section, a list of libraries is shown with checked checkboxes: Cobourg Public Library, INFO Union Catalogue, Kawartha Lakes Public Library, Oshawa Public Library, Pickering Public Library, Port Hope Public Library, Toronto Public Library, and Whitchurch-Stouffville Public Library. At the bottom are links for 'Select All' and 'Deselect All'.

*Example: A user whose is registered with Whitchurch-Stouffville Public Library would use the **SOLS Toronto/Kawartha/401 Area [shared]** profile as their “get started” profile.*

## Standard Search

A standard search is **key word** appearing anywhere 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 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.

**Standard Search**

Current Profile: SOLS North and East of 400 [shared] ▼

Search Term: mother daughter identity Friday **GO!**

## 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.

**Advanced Search**

Field	Search Term	Operator
Subject Heading ▼	mothers and daughters	and ▼
Subject Heading ▼	Women Psychology	and ▼
Subject Heading ▼		

Refinement: ☐ On ☒ Off

Records per page: 10 ▼

**GO!**

[PowerSearch](#) [PowerSearch](#) [PowerSearch](#) [RESET](#) [Standard Search](#)

## Double Check for Home Library Results

Users should always check the EGPL catalogue to verify if an item is locally held before placing an interlibrary loan request.

Patron requests for an item that is locally owned will not be processed into the system unless library staff determine that the locally held copy(s) are missing, damaged or otherwise not available for loan from the local collection.

If your library is a standalone catalogue in the INFO system, you can check search results.

- After the results appear on screen, you can have your home library search results (if any) come to the top of the screen by selecting the library name link.
- For instance, if your home library is **Whitchurch-Stouffville Public Library**, you can see that they own a copy and you would not request an interlibrary loan. You would instead go through your home library to borrow the locally owned copy.

**Search Results**

[Get More Hits](#) [Save Search](#)


Search for Any Equal Word "mother" and Any Equal Word "daughter" and Any Equal Word "friday" in [Barrie Public Library](#), [Bradford West Gwillimbury Public Library](#), [Georgina Public Library](#), [Huntsville Public Library](#), [INFO Union Catalogue](#), [Oshawa Public Library](#), [Toronto Public Library](#), [Whitchurch-Stouffville Public Library](#).

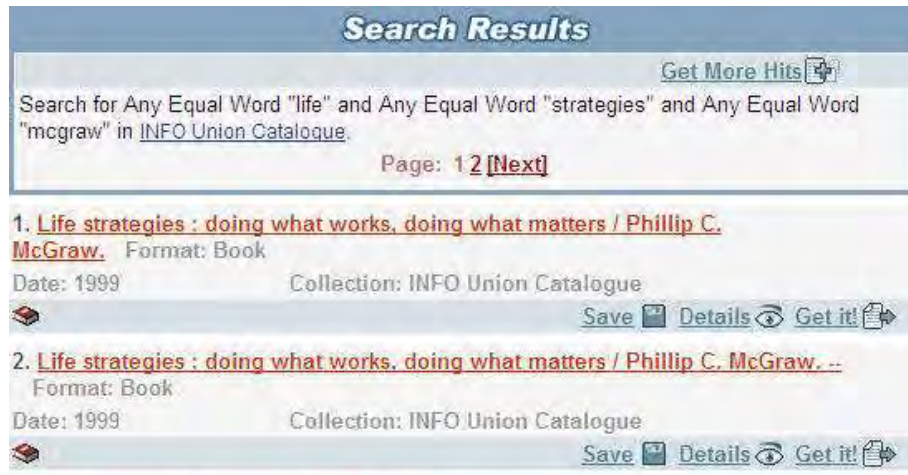
- 1. My mother/my self : the daughter's search for identity.**  
Date: 1977      Collection: Whitchurch-Stouffville Public Library  
[Save](#) [Details](#) [Get it!](#)
- 2. My mother / my self : a daughter's search for identity / Nancy Friday**  
Date: Unknown      Collection: INFO Union Catalogue  
[Save](#) [Details](#) [Get it!](#)
- 3. My mother/my self : the daughter's search for identity / Nancy Friday. --**  
Date: 1997      Collection: INFO Union Catalogue  
[Save](#) [Details](#) [Get it!](#)
- 4. My mother/my self : the daughter's search for identity / Nancy Friday.**  
Date: 1977      Collection: INFO Union Catalogue  
[Save](#) [Details](#) [Get it!](#)

*Search results with Whitchurch-Stouffville record pulled to the top of the list.*





## 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 **Details**  link on the displayed result to see full details.




## Record "Details" screen


- You can navigate in full details mode, using **Previous Record** and **Next Record**
- 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!**  link.
- You can select the **Author** and **Subject** hot links to search for similar records.

For instance, if you select **Mothers and daughters** subject link you will get search results for every item that contains that subject heading in its record, 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 [Get it!](#)  link.
- Occasionally, you may need to change the default service of “Loan” to “Copy” IF you are only requesting photocopies of pages 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*

Request Item	
<div>SUBMIT</div>	
Service:	<input checked="" type="radio"/> Loan <input type="radio"/> Copy
Copyright Type:	<div></div>
Title of Book:	Stories from the motherline
Subtitle:	reclaiming the mother-daughter bond, finding our f
Author(s)/Editor(s):	Lowinsky, Naomi Ruth
Sponsoring Body:	
Part Details	
If you only require a copy of part of this item then please enter details here.	
Author of Chapter/Article/Paper:	<div></div>
Title of Chapter/Article/Paper:	<div></div>
Date Published:	1992.
Volume/Issue:	<div></div>
Publication Details	
Series title and numbering:	<div></div>
Publisher:	J.P. Tarcher
Place of Publication:	Los Angeles
Edition:	<div></div>
Item Description:	229 p.
ISBN:	0-87477-680-5
ISSN:	<div></div>
Reference Source:	Georgina Public Library/GINA
Material Type:	Monograph
Additional Information	
This item is not needed after:	23 SEP 2006
Special Instructions:	<div></div>

## 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 will assign an ID number to your request.

**New Request**

Your request has been successfully catalogued.  
The system has assigned an id of **2586143** to the request.  
Use the [My Requests](#) option to track the status of this request.

**Request Details**

-- LOAN Request -- 08 MAR 2006 --

Request Number: 2586143

Further Information

This item is not needed 23 SEP 2006  
after:  
Special Instructions: DEF\_C N

PRINT



**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. Just sign in to your account.

## 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 **Create Request** under “My Account” in the left side panel. This will bring up 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 in March 2008
  - 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, they are **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 will cause the system to retrieve bibliographic hits with either the word "schnauzer" or the plural "schnauzers" in the subject heading.

Advanced Search			
Field	Search Term	Operator	
Subject Heading	miniature schnauzer*	and	<a href="#">PowerSearch</a>

### Checking Search Status (OPTIONAL)

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



**INFO Ontario** Results / Search Status

**Search**  
Standard Search  
Advanced Search  
Search History

**Results**  
Search Results  
Sort Options  
Merge Duplicates  
**Search Status**

**My Account**  
Saved List  
Saved Searches  
Create Request  
My Requests  
Search Profiles  
Account Details  
Sign Out  
Help

**Search Status**  
Presenting : Result contains 34 out of 34 hits

Target:	Status:	Total Hits:	Fetches Hits:	Requested Hits:
INFO Union Catalogue	Search Complete	17	17	17
Bradford West Gwillimbury Public Library	Error	0	0	0
Georgina Public Library	Search Complete	0	0	0
Toronto Public Library	Search Complete	13	13	13
Whitchurch-Stouffville Public Library	Search Complete	0	0	0
Barrie Public Library	Search Complete	1	1	1
Huntsville Public Library	Connecting	0	0	0
Oshawa Public Library	Search Complete	3	3	3

## 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.



**Merge Duplicates**

Number of records to Merge (max 1000):

**MERGE**

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.



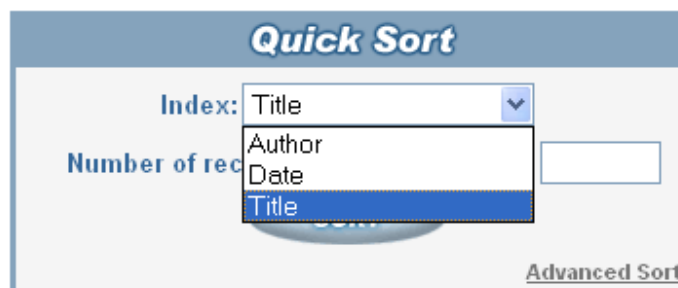
Page: [1](#) [2](#) [3](#) [\[Next\]](#)

Status:	Total Hits:	Total Returned:	Duplicates:
Search Complete	34	22	12

## Sorting Search Results (OPTIONAL)

It is not necessary but you have the option to select Sort Options 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.



**Quick Sort**

Index:

Number of records:

[Advanced Sort](#)

## 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:

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.”



The 'Filter Options' dialog box has a title bar 'Filter Options'. It contains three sections: 'Limit results by date:' with radio buttons for 'Specific year:' (with a text box and year 'yyy') and 'Range of years from:' (with two text boxes and years 'yyy' and 'to yyy'); 'Format(s):' with a link 'click to scroll list of options', a list of checkboxes for 'Report', 'Large Print Book' (checked), and 'Braille Book', and buttons 'Select all' and 'Clear all'; and 'Language(s):' and 'Level(s):' each with a link 'click to scroll list of options'. At the bottom is a yellow 'GO!' button.

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.



The search results list shows three items, each with a title link, format, date, collection, and action buttons. Below the list is a summary table.

Status:	Total Hits:	Total Returned:	Total Filtered:	Duplicates:
Search Complete	3	3	18	0

## 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 **Search History** under “Search” in the left side panel.
- You can **Re-Run** a search from History or **Edit** it by changing some of the details or the profile used to search against.

**Search History**

Choose from the options below to edit or re-run your search

<b>Search Term:</b>	Any Equal Word "hair" and Any Equal Word "design"
<b>Collections:</b>	INFO Union Catalogue
<a href="#">Edit</a>  <a href="#">Re-run</a> 	
<b>Search Term:</b>	Any Equal Word "yoga" and Any Equal Word "for" and Any Equal Word "beginners"
<b>Collections:</b>	INFO Union Catalogue
<a href="#">Edit</a>  <a href="#">Re-run</a> 	




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

It is not necessary but you have the option to use the **Save Search**  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 **Saved Searches** under “My Account” in the left side panel.
- You can **Re-Run** the search as it was originally run or **Edit** the search to change how it was composed or to select a different search profile to run it against.

**Saved Searches**


Choose from the options below to edit, re-run or delete your search.

<b>Search Term:</b>	Subject Heading Equal Word "dog" and Subject Heading Equal Word "training" and Subject Heading Equal Word "puppies"
<b>Collections:</b>	Barrie Public Library, Bradford West Gwillimbury Public Library, Georgina Public Library, Huntsville Public Library, INFO Union Catalogue, Oshawa Public Library, Toronto Public Library, Whitchurch-Stouffville Public Library
<b>Last Used: 8:03:39 PM on March 13, 2006</b>	
<a href="#">Edit</a>  <a href="#">Re-run</a>  <a href="#">Delete</a> 	

*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 [Save](#)  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.



**INFO Ontario** My Account / Saved List

Select items in the saved list using the check box against each one. Click the relevant button to remove, email, request or print the selected items. The saved list is cleared when you log out.

**Saved List**

Select all  Bring to top  Remove  E-mail   
Deselect all  Get it!  Print 

1. **Don't blame mother mending the mother-daughter relationship** Paula J. Caplan.  
Date: 1989 Collection: Whitchurch-Stouffville Public Library  
☐ Remove  E-mail  Get it!  Print  Details 

2. **Stories from the motherline : reclaiming the mother-daughter bond, finding our feminine souls**  
Date: 1992 Collection: Georgina Public Library  
☐ Remove  E-mail  Get it!  Print  Details 

## 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 [Cancel](#) link on the request itself.



ILL Number: 2602925  
Title: **Marie Antoinette**  
Author: Lasky, Kathryn  
Status: Pending


[Cancel](#)  [View](#) 

ILL Number: 2602925  
Title: **Marie Antoinette**  
Author: Lasky, Kathryn  
Status: Cancelled  
Circulation Status:  
Request No Longer Required  
Needed by: 30 Oct 2009

Cancelled requests are stamped “Request No Longer Required”



## How is your request doing?

- Select **My Requests** under “My Account” in left side panel to see the requests you have in the system.
- You can have the results sort 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](#) 

*My Account / My Requests / Requests List*

**Requests List**  
7 requests found  
Page: [\[Previous\]](#) **1** [2](#)


ILL Number:	2602862	Cancel  View 
Title:	<a href="#">Heart-friendly cooking, low in fat &amp; sodium</a>	
Author:	Paré, Jean, 1927-	
Status:	Shipped	
Circulation Status:		
Date Due:	21 Apr 2010	

ILL Number:	2602819	Cancel  View 
Title:	<a href="#">You can be happy no matter what</a>	
Author:	Carlson, Richard, 1961-2006	
Status:	Pending	
Circulation Status:		
Needed by:	18 Oct 2009	



## Interpretation of Request Status

<b>Status:</b>	<b>New</b> means that the request has not yet been fully processed into the VDX system by Ontario Library Service ILL Unit staff.
<b>Status:</b>	<b>Pending</b> means the request is pending action from a potential lending library
<b>Status:</b>	<b>Cancelled</b> means that a cancellation was submitted for an item no longer wanted
<b>Status:</b>	<b>Shipped</b> means that a lending library has agreed to lend the item and is shipping it to your library. The item is on its way, but has not yet arrived at your library
<b>Status:</b>	<b>Received</b> means your library has received the item and is preparing it for loan. Patron notification by email or telephone will occur to advise when and where the item is available for pick up.
<b>Status:</b>	<b>Returned</b> means that the item is being returned to the lending library
<b>Title:</b>	<b><u>*SELECT VIEW TO SEE NOTE</u></b> in front of the title means you should select the <a href="#">View</a>  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.

## Changing your password

You can keep the password provided to you by library staff or you can change it if you wish.

1. Select **Account Details** under “My Account” in left side panel.
2. Select **Edit** on the resulting screen
3. Make sure to select “Update Password” to create a “tick” mark
4. Enter your new password and then **SUBMIT**.

Make a note of your password somewhere. If you forget your user password you will have to contact library staff to reset a password for you.



*Screen where you can change your password.*

## 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 need to contact library staff to request an extension on a loan period of an interlibrary loan item. Telephone or email library staff and provide the title and the INFO system request ILL number.

### EGPL Interlibrary Loan Contact Information

**Telephone:** 905-836-6492

**Email:** infoEGPL@primus.ca