

# User Guide

for placing Interlibrary Loan Requests



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

anytime, anywhere

from library  
from home  
from work  
from school



from anywhere there is internet access



**INFO**  **ntario**

## Sign-In Procedure

1. Use your browser to go to: <http://info.vdxhost.com/en/zportal>

Select Sign In

**INFO Ontario**

**Welcome to Information Network For Ontario**

The INFO system is the virtual 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.

Ontario Library Service – North  
Service des bibliothèques de l'Ontario – Nord

Southern Ontario Library Service

Select **Standard Search** to search as a guest  
Select **Sign-In** to issue Interlibrary Loan requests \*

\* Patrons must pre-register with their local public library for this service.

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 local public 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. It is important to select the correct home library where your user account is registered.



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

**Sign-in**

User ID:

Password:

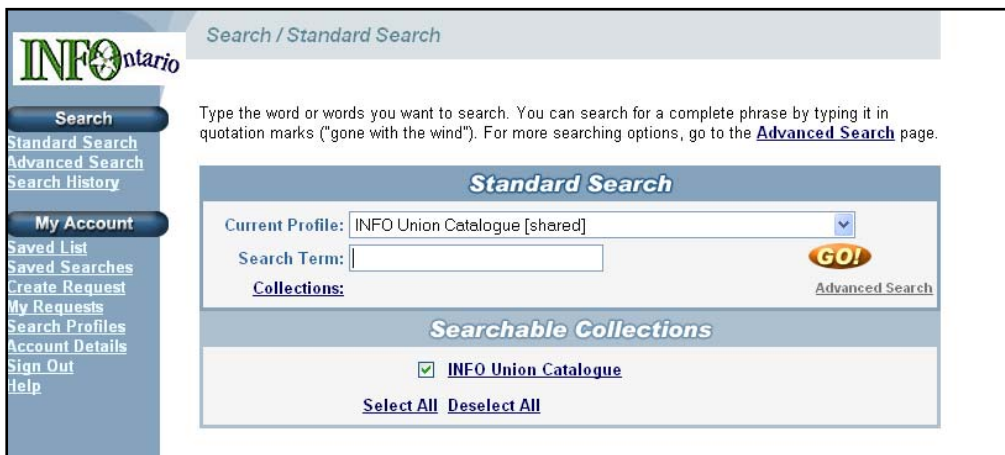
Authentication Service:

**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



*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 need to select a different profile in the list to search against **ONLY 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.



*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 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"

<b>You enter -</b> Life strategies	<b>Results In 205 hits</b>
<b>You enter -</b> "Life strategies"	<b>Results In 37 hits</b>
<b>You enter -</b> "Life strategies" McGraw	<b>Results In 14 hits</b>

**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:**  **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	
<input type="text" value="Subject Heading"/> ▼	<input type="text" value="mothers and daughters"/>	and ▼	<a href="#">PowerSearch</a>
<input type="text" value="Subject Heading"/> ▼	<input type="text" value="Women Psychology"/>	and ▼	<a href="#">PowerSearch</a>
<input type="text" value="Subject Heading"/> ▼	<input type="text"/>	<b>RESET</b>	<a href="#">PowerSearch</a>

Refinement  On  Off

Records per page:  ▼

**GO!**  
[Standard Search](#)

## Double Check For Home Library Results

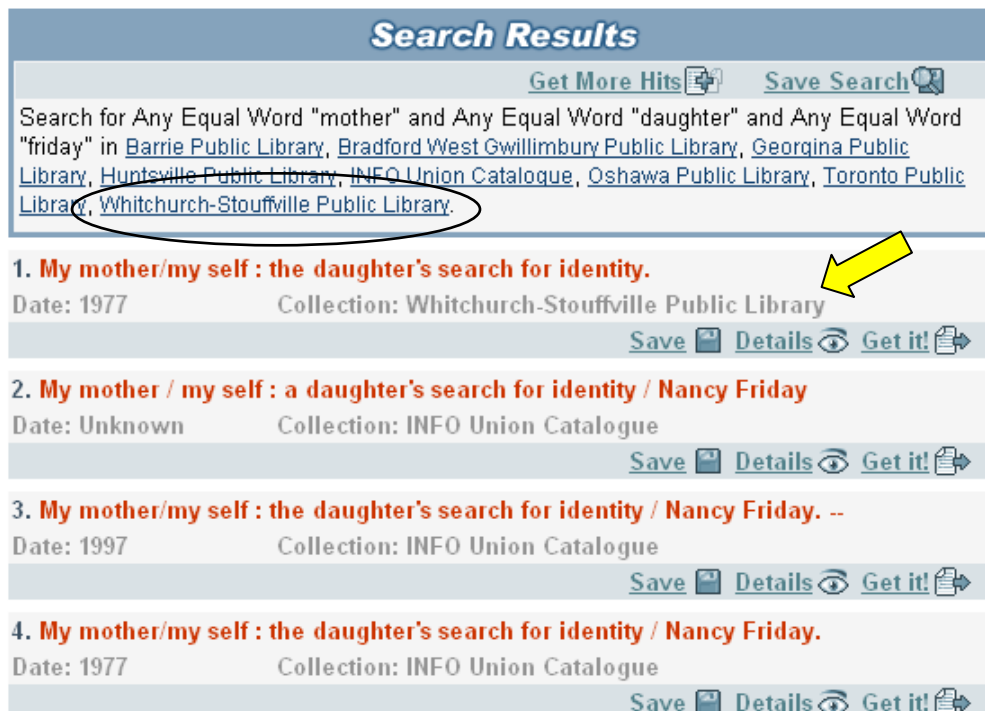
Where possible, users should have checked their home library web accessible catalogue to verify if an item is locally held before placing an interlibrary loan request.

Patron issued 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's collection is represented in the INFO Union Catalogue it is not as easy to double-check search results for a locally owned copy.

However, if your library is a stand alone catalogue in the INFO system you can double-check search results quite easily.

- 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 therefore 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





### Search Results





[Get More Hits](#) 

Search for Any Equal Word "life" and Any Equal Word "strategies" and Any Equal Word "mcgraw" in [INFO Union Catalogue](#).



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

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1. [Life strategies : doing what works, doing what matters / Phillip C. McGraw.](#) Format: Book  
 Date: 1999 Collection: INFO Union Catalogue  
 [Save](#)  [Details](#)  [Get it!](#) 

2. [Life strategies : doing what works, doing what matters / Phillip C. McGraw. --](#)  
 Format: Book  
 Date: 1999 Collection: INFO Union Catalogue  
 [Save](#)  [Details](#)  [Get it!](#) 

## 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 everything with that subject heading in the record from the collections in the chosen profile. Some of them are psychology books but some of them are children’s picture books.

### Record Details

[\[Previous Record\]](#)
Record 4 of 10
[\[Next Record\]](#)


Collection: **INFO Union Catalogue**

---

[Save](#)  [Get it!](#) 

<b>Title:</b>	<a href="#">My mother/my self : the daughter's search for identity / Nancy Friday.</a>
<b>Authors:</b> <small>(Click on an item to perform a search for similar records.)</small>	<a href="#">Friday, Nancy.</a>
<b>Imprint:</b>	New York : Delacorte Press, c1977.
<b>Description:</b>	xviii, 425 p. ; 24 cm.
<b>Notes:</b>	Bibliography: p. 421-425.
<b>Subjects:</b> <small>(Click on an item to perform a search for similar records.)</small>	<a href="#">Love, Maternal.</a> <a href="#">Mothers and daughters.</a> <a href="#">Sex (Psychology)</a> <a href="#">Women -- Psychology.</a>

## 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 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

Request Item	
<b>SUBMIT</b>	
Service:	<input checked="" type="radio"/> Loan <input type="radio"/> Copy
Copyright Type:	<input type="text"/>
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:	<input type="text"/>
Part Details	
If you only require a copy of part of this item then please enter details here.	
Author of Chapter/Article/Paper:	<input type="text"/>
Title of Chapter/Article/Paper:	<input type="text"/>
Date Published:	1992.
Volume/Issue:	<input type="text"/>
Publication Details	
Series title and numbering:	<input type="text"/>
Publisher:	J.P. Tarcher
Place of Publication:	Los Angeles
Edition:	<input type="text"/>
Item Description:	229 p.
ISBN:	0-87477-680-5
ISSN:	<input type="text"/>
Reference Source:	Georgina Public Library/GINA
Material Type:	Monograph
Additional Information	
This item is not needed after:	23 SEP 2006
Special Instructions:	<input type="text"/>

## 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.

**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.

## 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 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, it is **COMPLETELY OPTIONAL** if you use them.

### 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.

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**ntario

[Search](#)

[Standard Search](#)

[Advanced Search](#)

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**Results**

[Search Results](#)

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**My Account**

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Results / Search Status

**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.



The dialog box has a blue header with the text "Merge Duplicates". Below the header, it says "Number of records to Merge (max 1000):" followed by an empty text input field. At the bottom center of the dialog is a blue oval button with the word "MERGE" in white capital letters.

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.



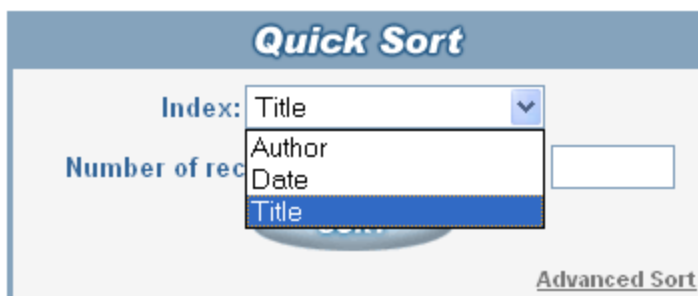
A summary box with a blue border containing search statistics. At the top center, it says "Page: 1 2 3 [Next]". Below this, there are four columns of data:

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.



The dialog box has a blue header with the text "Quick Sort". Below the header, it says "Index:" followed by a dropdown menu with "Title" selected. Below the dropdown is a list of options: "Author", "Date", and "Title", with "Title" highlighted in blue. To the right of the list is an empty text input field. At the bottom right of the dialog is a link that says "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”.

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.

1. <a href="#">The Tristan betrayal / Robert Ludlum. --</a> Format: Large Print Book				
Date: 2004	Collection: INFO Union Catalogue			
	<a href="#">Save</a>	<a href="#">Details</a>	<a href="#">Get it!</a>	
2. <a href="#">The Tristan betrayal / Robert Ludlum.</a> Format: Large Print Book				
Date: 2004	Collection: INFO Union Catalogue			
	<a href="#">Save</a>	<a href="#">Details</a>	<a href="#">Get it!</a>	
3. <a href="#">The Tristan betrayal / Robert Ludlum.</a> Format: Large Print Book				
Date: 2004	Collection: INFO Union Catalogue			
	<a href="#">Save</a>	<a href="#">Details</a>	<a href="#">Get it!</a>	
<b>Status:</b>	<b>Total Hits:</b>	<b>Total Returned:</b>	<b>Total Filtered:</b>	<b>Duplicates:</b>
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.

<b>Search History</b>	
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.

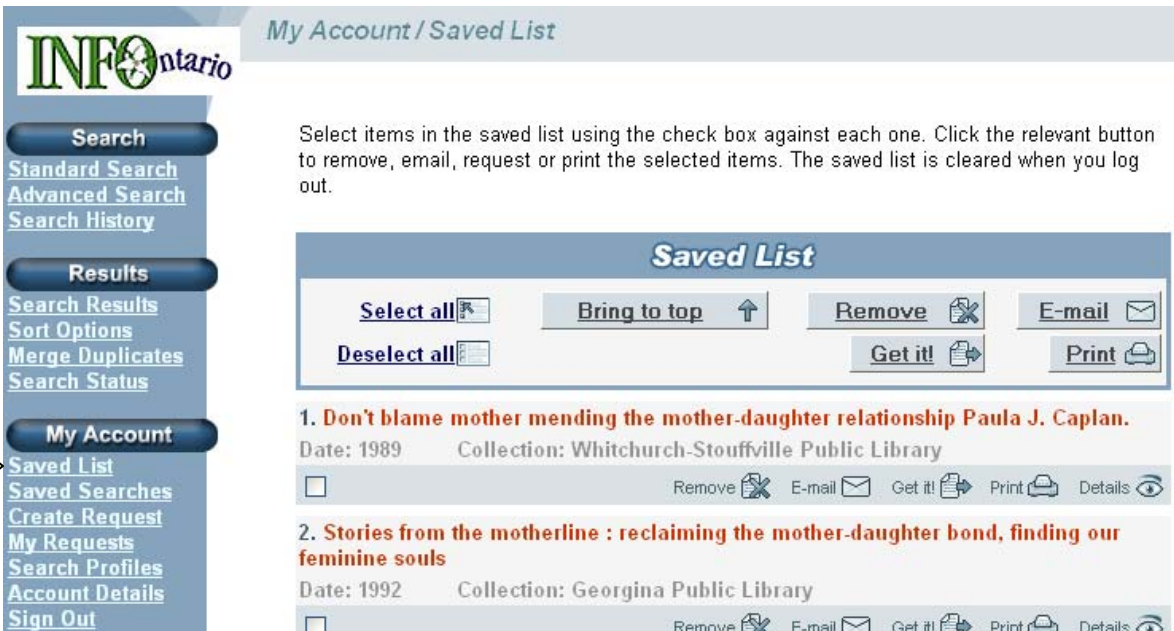
<b>Saved Searches</b>	
Choose from the options below to edit, re-run or delete your search.	
<b>Search Term:</b>	Subject Heading Equal Word "dog" and Subject Heading Equal Word "training" and Subject Heading Equal Word "puppies"
<b>Collections:</b>	Barrie Public Library, Bradford West Gwillimbury Public 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](#)

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

**ILL Number:** 2602862  
**Title:** [Heart-friendly cooking, low in fat & sodium](#)  
**Author:** Paré, Jean, 1927-  
**Status:** Shipped  
**Circulation Status:**  
**Date Due:** 21 Apr 2010

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

**ILL Number:** 2602819  
**Title:** [You can be happy no matter what](#)  
**Author:** Carlson, Richard, 1961-2006  
**Status:** Pending  
**Circulation Status:**  
**Needed by:** 18 Oct 2009

## 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 your library. The item is on its way, but has not yet arrived at your library

**Status:** **Received**  
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.

**Status:** **Returned**  
means that the item is being returned to the lending library





**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.

## Troubleshooting access problems

### Check browser version

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

#### Legend

	Supported
	Currently supported but support will be discontinued in next major release
	Not supported
	Not fully tested – contact OCLC (UK) for details

#### Browsers

Note

	IE 5.5	IE 6.0	IE 7.0	Firefox 1.x	Firefox 2.x	Firefox 3.x	IE 5.2 Mac	Firefox 1.0 Mac	Firefox 2.0 Mac	Safari 1.2 MAC X	Safari 2.0 MAC X
OLIB WebView 2.6.1	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗
OLIB WebView 2.6.2	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗
VDX /ZPORTAL 3.1	✗	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗
VDX /ZPORTAL 3.2.1	✗	✗	✓	✗	✓	✓	✗	✗	✗	✗	✗
VDX /ZPORTAL 4.0 aka "Mars"	✗	✗	✓	✗	✓	✓	✗	✗	✓	✗	✓
VDX /ZPORTAL "Jupiter"	✗	✗	✓	✗	✓	✓	✗	✗	✓	✗	✓

### 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".

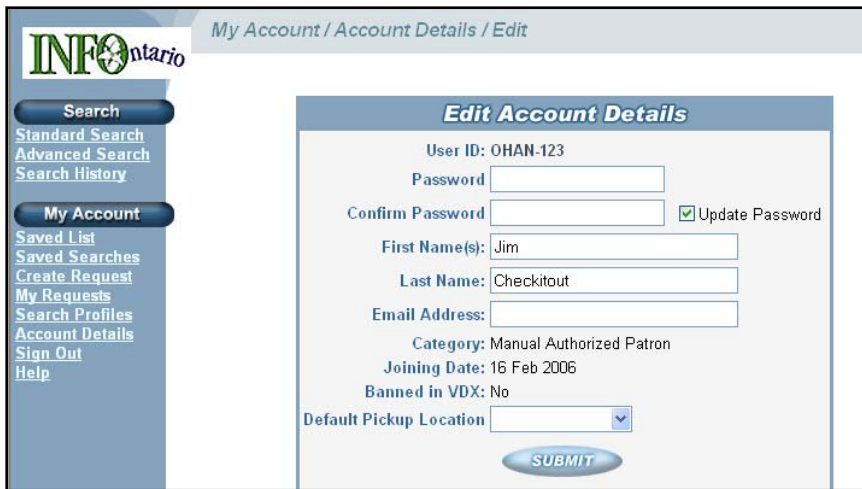


## Changing your password

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.



The screenshot shows the 'Edit Account Details' page in the INFO Ontario system. The page title is 'My Account / Account Details / Edit'. On the left, there is a navigation menu with 'My Account' selected. The main content area contains the following fields and information:

- User ID: OHAN-123
- Password: [Text Input]
- Confirm Password: [Text Input]  Update Password
- First Name(s): Jim
- Last Name: Checkout
- Email Address: [Text Input]
- Category: Manual Authorized Patron
- Joining Date: 16 Feb 2006
- Banned in VDX: No
- Default Pickup Location: [Dropdown Menu]
- SUBMIT** button

*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 your library 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. You may find it handy to write your library's interlibrary loan department contact details in this user guide.

Interlibrary Loan Department Contact Information	
	<p><b>Telephone:</b></p> <p><b>Email:</b></p> <p><b>Hours:</b></p>