

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



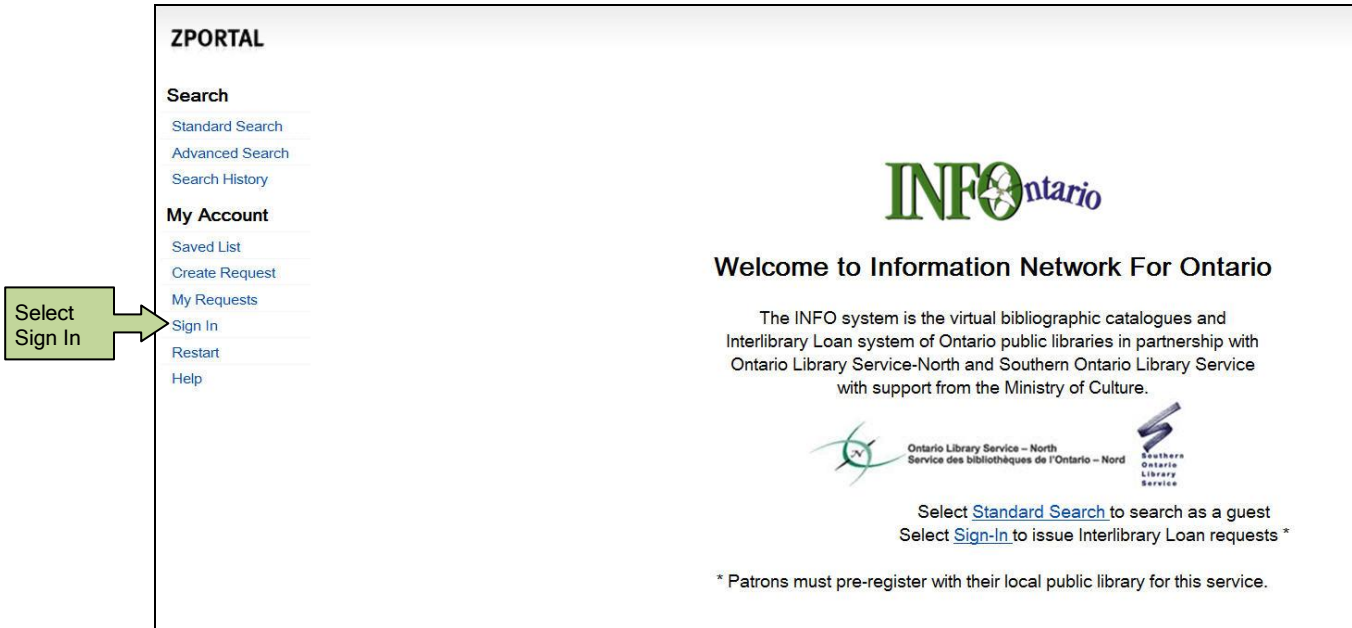
from anywhere there is internet access



INFO  **ntario**

Sign-In Procedure

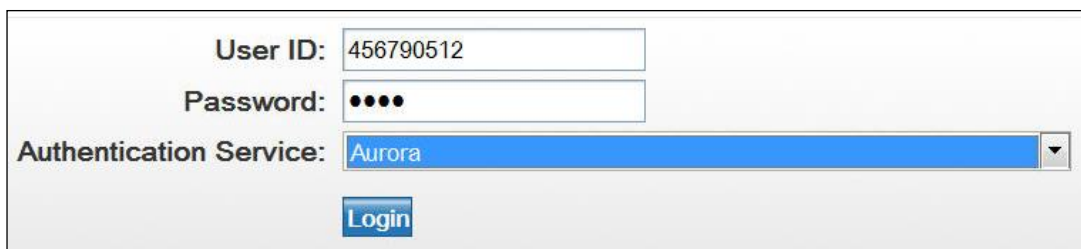
1. Use your browser to go to: <https://info.vdxhost.com/en/zportal>
2. Select English or French



The screenshot shows the Zportal interface. On the left, there is a navigation menu with sections: **ZPORTAL**, **Search** (with links for Standard Search, Advanced Search, and Search History), and **My Account** (with links for Saved List, Create Request, My Requests, Sign In, Restart, and Help). A green box with the text "Select Sign In" and an arrow points to the "Sign In" link in the My Account section. The main content area features the INFO Ontario logo, a welcome message, and instructions for searching and signing in. It also includes logos for Ontario Library Service - North and Southern Ontario Library Service, and a note that patrons must pre-register with their local public library.

2. 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 self-serve Interlibrary Loan service.**
 - 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.



The screenshot shows a sign-in form with the following fields and values:

- User ID: 456790512
- Password: ●●●●
- Authentication Service: Aurora (selected from a dropdown menu)
- There is a blue "Login" button below the fields.

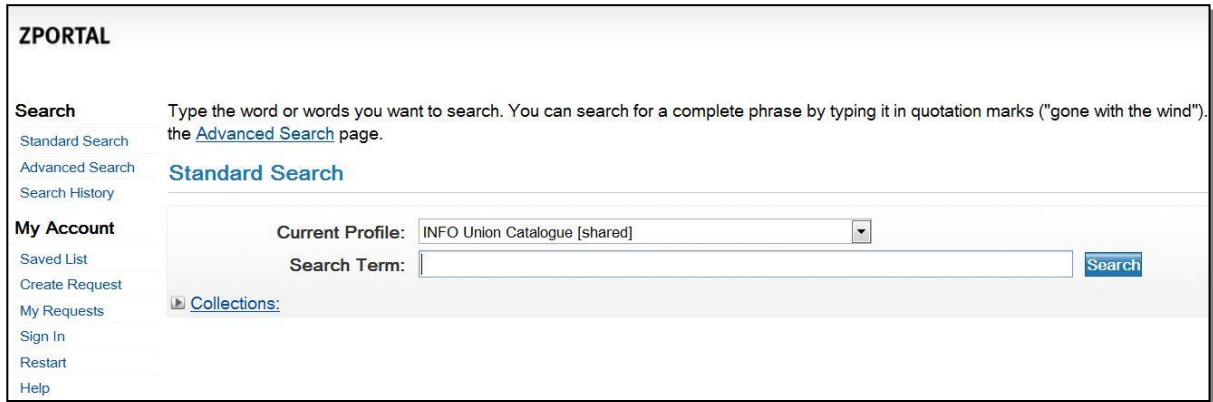
Example of sign-in of a user registered at Aurora Public Library

Ending an INFO session

When you wish to end your session, select **Sign Out** under "My Account" in the left side panel.

General Screen Navigation

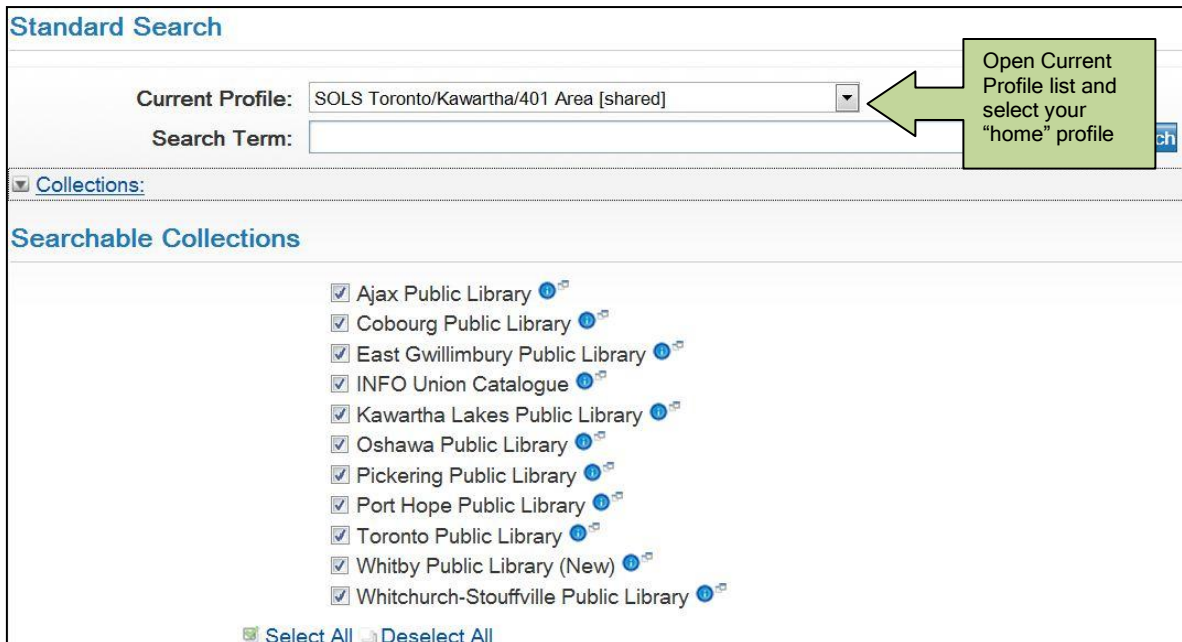
- First screen after log-in is always the **Standard Search** screen
- Left hand navigation panel links are to choose an activity
- F11 toggles your browser tool bars On/Off at top of screen in Internet Explorer
- Browser <BACK > button is not used in INFO



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” or “home” 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 registered with Ajax 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"

You enter - Life strategies	Results in LOTS of hits (many irrelevant)
You enter - "Life strategies"	Results in FEWER hits (more concise)
You enter - "Life strategies" McGraw	Results in LEAST hits (most precise)

Example: Suppose you want this book about mothers and daughters talking about sex and there is something about blue jeans in the title *but you are not sure of the exact title*. There are two authors, one of them is Susan Lieberman. You can combine key words from the TITLE and AUTHOR in a Standard search.

Standard Search

Current Profile: SOLS Rideau North [shared] ▼

Search Term: mothers daughters blue jeans Lieberman

This search retrieved:

Venus in blue jeans : why mothers and daughters need to talk about sex / Nathalie Bartle with Susan A. Lieberman.

Advanced Search

Advanced search uses selectable fields and Boolean operators to retrieve more precise results.

Example: Suppose you want to view only psychology books on mother daughter relationships. You can retrieve that using **Advanced Search** subject heading search and Boolean operators.

Advanced Search

Field	Search Term	Operator
Subject Heading ▼	mothers and daughters	and ▼
Subject Heading ▼	women psychology	and ▼
Subject Heading ▼		Reset

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 **Carleton Place 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

You searched for **((sex AND instruction) AND for) AND girls** in [Deep River Public Library](#), [INFO Union Catalogue](#), [Hawkesbury](#), [Bibliothèque publique de](#), [Ottawa Public](#), [Dundas Glengary County Public Library](#), [Petawawa Public Library](#), [Carleton Place Public Library](#), [Clarence-Rockland Public Library](#), [Amprior Public Library](#), [Cornwall Public Li](#), [Valley \(Barry's Bay\)](#).


Refine results: [Refine this search](#)

Page: [Prev] 1 2



1. [Hang-ups, hook-ups, and holding out : stuff you need to know about your body, sex, and dating / Melisa Holmes and Trish Hutchison.](#)
Format: Book | Date: 2008 | Collection: Carleton Place Public Library
2. [Changes in you and me : a book about puberty, mostly for girls / Paulette Bourgeois and Kim Martyn](#)
Format: Book | Date: 2005 | Collection: Carleton Place Public Library
3. [The "what's happening to my body?" book for girls : a growing-up guide for parents and daughters / Lynda Madaras](#)
Format: Book | Date: 2000 | Collection: Carleton Place Public Library
4. [Boys lie : how not to get played / Belisa Vranich and Holly Eagleson. --](#)
Format: Book | Date: 2010 | Collection: Petawawa Public Library

Search results with Carleton Place Public Library records pulled to the top of the list.

Viewing Search Results

- To browse through multiple pages of search results, select Page: [Prev] 1 **2 3 4 5 6 7** [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
- “Show Best Results” under **Results** in left navigation panel, sorts results by relevance (to the terms entered).



Record Details screen

- You can navigate in full details mode, using [Previous Record](#) and [Next Record](#)
- You can  [Save](#) a particular record to a Saved List to print, email, or request later.
- You can place an interlibrary loan request for an item using  [Get it!](#)
- You can select the [Author](#) and [Subject](#) links to search for similar records.

For instance, if you select [Sex Instruction For Girls - Juvenile Literature](#) subject link you will get search results for everything with that subject heading in the record from the collections in the chosen profile.

Record Details

Record 2 of 112 | Collection Carleton Place Public Library < [Previous Record] | [Next Record] >

 Save  Get it!

Changes in you and me : a book about puberty, mostly for girls / Paulette Bourgeois and Kim Martyn

Format: Book

Authors: [Bourgeois, Paulette](#)

Imprint: Toronto : Key Porter Books Limited, c2005

Description: 64 p.

Notes: 1

Subjects: [Puberty -- Juvenile Literature](#) | [Sex Instruction For Girls -- Juvenile Literature](#)

Added Authors: [Martyn, Kim](#)


ISBN: 1552636704

Language: English

Links to perform a subject search

Location:	Call Number:	Availability:	Local Control Number:
Carleton Place - Main	J613.955 BOU	AVAIL Type:J-NONFIC Copy #1	01-0096699

Creating a Request from Search Results

- If you want to place a request, select a record from the search results and click on  [Get it!](#)
- Occasionally, you may need to change the default service type of “Loan” to “Copy” IF you were requesting photocopies from a journal.
- There is rarely anything you need to add to this form. Check that “Pick-up Location” at the bottom of the request form is selected as appropriate and click on **Request** button either at the top or bottom of the form and your request will be issued.

My Requests

Using the "Get it!" link results in this Request form

Request

Service: Loan Copy

Copyright Type:

Title of Book: The Friday Night Knitting Club

Subtitle:

Author(s)/Editor(s): Jacobs, Kate 1973-

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:

Title of Chapter/Article/Paper:

Volume:

Publication Details

Series title and numbering:

Publisher: Penguin Group

Place of Publication: New York

Date Published: c2007.

Edition:

Item Description: 345 p.

ISBN: 9780399154096; 0399154094

ISSN:

UPC:

Reference Source: Innisfil Public Library/tsuga
 Format: Book

Additional Information

This item is not needed after: 29 OCT 2011

*Email:

Amount willing to pay:

Special Instructions:

Holdings

Location:	Call Number:	Availability:	Local Control Number:
Innisfil - Stroud - Main	FIC Jacob	Circulation status undefined	INNISFILb10133813

Pickup Location: Aurora - Main

Request

Confirmation that request was successfully submitted

- After you use the **Request** button the INFO system will respond with “Your request has been successfully catalogued” and assigns an ID number to your request.

Request Result

Your request has been successfully catalogued.

The system has assigned an **id of 9108177** to the request.

Use the [My Requests](#) option to track the status of this request.

Request Details

-- LOAN Request -- 13 Apr 2011 --

Request Number: 9108177
Author(s)/Editor(s): Jacobs, Kate 1973-
Title of Book: The Friday Night Knitting Club

Pickup Location

Addressee: SOLS VAN ROUTE: G
Street: 15145 Yonge Street
City: Aurora
Region: Ontario
Post Code: L4G 1M1
Fax: 905 727-9374
Phone: 905 727-9493
E-mail: illo@library.aurora.on.ca

Further Information

This item is not needed after: 29 Oct 2011

[Print Receipt](#)



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 online anytime you like without knowing the request ID numbers.

See page 14 in this Guide.

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 navigation 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 ▼
Author ▼		and ▼
Subject Heading ▼		Reset

Checking Search Status (OPTIONAL)

It is not necessary but you have the option to select **Search Status** under “Results” in left navigation panel to determine how many results you have from each catalogue.

Search Status

Search Complete : Result contains 26 out of 26 hits

Target:	Status:	Total Hits:	Fetches Hits:	Requested Hits:
INFO Union Catalogue	Search Complete	17	17	10
Caledon Public Library	No Hits	0	0	0
Midland Public Library	No Hits	0	0	0
Innisfil Public Library	Search Complete	2	2	2
Collingwood Public Library	Search Complete	1	1	1
King Township Public Library	Search Complete	1	1	1
New Tecumseth Public Library	No Hits	0	0	0
Aurora Public Library	Search Complete	4	4	4
Penetanguishene Public Library	No Hits	0	0	0
Essa Public Library	Search Complete	1	1	1
Clearview Public Library	No Hits	0	0	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 search profile used to search against.

Search History

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

Search Term: **((tristan AND betrayal) AND ludlum)**

Collections: Pickering Public Library, Port Hope Public Library, Whitby Public Library (New), Ajax Public Library, Oshawa Public Library, INFO Union Catalogue, East Gwillimbury Public Library, Toronto Public Library, Whitchurch-Stouffville Public Library, Kawartha Lakes Public Library, Cobourg Public Library

 Edit  Re-run

Search Term: **(miniature AND schnauzer)**

Collections: Pickering Public Library, Port Hope Public Library, Whitby Public Library (New), Ajax Public Library, Oshawa Public Library, INFO Union Catalogue, East Gwillimbury Public Library, Toronto Public Library, Whitchurch-Stouffville Public Library, Kawartha Lakes Public Library, Cobourg Public Library

 Edit  Re-run

Saving the entire Search for future reference (OPTIONAL)

It is not necessary but you have the option to select **Save this search** under “Results” in the left navigation panel to save the search for future reference.

- 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 are saved indefinitely, until **Delete** is selected on them.

Saved Searches

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

Search Term: **TSUNAMI**

Saved: 11:49:24 PM on April 13, 2011

Collections: Ajax Public Library, INFO Union Catalogue, East Gwillimbury Public Library

 Edit  Re-run  Delete

Example of Saved Searches screen

Merging Duplicates in the search Results (OPTIONAL)

It is not necessary but you have the option to **Merge Duplicates** under “Results” in the left navigation panel. Merging duplicates will cut down on the amount of records to scroll through on the screen.

Note: Deduplication will only work on an ISBN or ISSN search.

Click on the **Merge Duplicates** button to merge duplication in the search results.

Your search has returned **26** out of **26** hits.

Number of records to Merge (max 1000):

Merge Duplicates

Note there are 20 unique records and 6 duplicates in the 26 hits in our *miniature schnauzer* example search after they were merged.

Total Hits:
26

Total Returned:
20

Duplicates:
6

Sorting Search Results (OPTIONAL)

It is not necessary but you have the option to select **Sort Options** under “Results” in the left navigation panel to arrange your results in the manner you wish.

Perhaps you want to see your search results in alphabetical order by “Title” or maybe you want to see if there are several titles by the same Author or perhaps you would like to sort by Date so the most recently published items are at the top of the list.

Your search has returned **20** out of **20** hits.

Sort by:

Number of records to Sort (max 1000):

- Author
- Collection
- Date
- Full-text availability
- Relevance
- Title**

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.

Standard Search

Current Profile:	SOLS Simcoe/York [shared]
Search Term:	tristan betrayal ludlum

2. AFTER the result set displays, select **Filter Options** under Results in left navigation panel. Select Format(s) to open the option list. Use Clear all and then select “Large Print Book”.

Filter Options

Limit results by date: Specific year: YYYY
 Range of years from: YYYY to YYYY

Format(s): [click to scroll list of options](#)

Report

Large Print Book

Braille Book

Select all Clear all

Language(s): [click to scroll list of options](#)

Level(s): [click to scroll list of options](#)

Filter Results

3. The original result set of 21 is reduced to the selected format. In this example, 4 Large Print results and 17 results filtered out because they are not Large Print.


Total Hits:
4

Total Returned:
4

Total Filtered:
17

Duplicates:
0







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. **IMPORTANT Note:** The Saved List is cleared when you Sign Out of your session.
- Use the  Save link on the request search result to save it to the “Saved List” file.
- To view your saved items, select **Saved List** under “My Account” in the left navigation panel.


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 Deselect all





Bring to top  Remove  E-mail 
Export  Get it!  Print 

Page: [Prev] 1 2 [Next] >

1. [Bear at work / written by Stella Blackstone ; illustrated by Debbie Harter.](#)
 Format: Book | Date: 2008 | Collection: Guelph Public Library

2. [The bird watching answer book : everything you need to know to enjoy birds in your backyard and beyond / Laura Erickson.](#)
 Format: Book | Date: 2009 | Collection: Guelph Public Library

Cancelling a request

To cancel a request you previously made use the **Cancel** icon on the request. The **Cancel** icon only displays on requests that are New or Pending status. A request that has already been fulfilled by a supplying library can't be cancelled.

ILL Number:	9107382
Author:	Crocker, Betty
Title:	Betty Crocker's low-fat cooking
Status:	Pending
Circulation Status:	
Date Due:	05 May 2011
Pickup Location:	Aurora - Main

 Cancel  Details

ZPORTAL displays the request details. Click “Cancel Request” button to cancel the request or Go Back link to exit the cancel process. ZPORTAL confirms the request is cancelled.

ILL Number:	9107382
Author:	Crocker, Betty
Title:	Betty Crocker's low-fat cooking
Status:	Pending
Circulation Status:	
Date Due:	05 May 2011
Pickup Location:	Aurora - Main

Once cancelled, the **My Requests** search results displays request with “Request No Longer Required”


How are your requests doing?

Select **My Requests** under “My Account” in left navigation panel to see a summary of the requests you've sent to your library's Interlibrary Loan department. This list includes your currently active ILLs that are not yet 'completed'.

The brief display includes ZPORTAL-assigned **ILL Number, Title, Author, ILL Status**. The **Due Date** is the date when your home organization has to have the item back to the lending library. If the Due Date is not yet known ZPORTAL displays your **Needed By** date.

Unless the user re-sorts, requests are displayed in decreasing order by ILL Number. Results can be sorted by Request #, Title etc. and you can specify 5, 10, 15, 20 Records per page.

The request list header includes a “Jump to ILL” search box to search for requests by ILL Number.

You can see the request in more detail by selecting the “Title” hot link or  [Details](#) icon.

Requests List

Jump to ILL:

Records per page: 10

Show everything


Sort by ILL Number descending ascending

Sort by descending ascending



[Submit Query](#)

10 requests found Page 1

ILL Number:	9107383
Author:	Crocker, Betty
Title:	Betty Crocker's cooking with American wine. --
Status:	Shipped
Circulation Status:	
Needed by:	26 Sep 2011
Pickup Location:	Aurora - Main

 [Details](#)

ILL Number:	9107382
Author:	Crocker, Betty
Title:	Betty Crocker's low-fat cooking
Status:	Pending
Circulation Status:	
Date Due:	05 May 2011
Pickup Location:	Aurora - Main

 [Cancel](#)  [Details](#)


Interpretation of Request Status

Status	Means
Cancelled	For whatever reason your request is now cancelled.
Damaged	The requesting or responding library has reported the item is damaged.
Lost	The requesting or supplying library has reported the item is lost or it never arrived.
New	The ILL requesting process has not yet started.
No holdings found	This is a temporary status; library staff will search for more possible lending libraries
Overdue	Your request is overdue at the supplying library.
Pending	The ILL process has started but your request is still pending action from a potential lending library.
Recalled	The supplying library has asked for the item to be sent back.
Received	The item has been received at your requesting library and is being prepared for loan. WAIT...Patron notification by email or telephone will occur to advise when and where the item is available for pick up.
Renewal Requested	Your library has asked for renewal of the due date on your behalf.
Returned	The item has been sent back to the supplying library.
Shipped	The ILL supplier has shipped the item; it is on its way, but has not yet arrived at your library.

Requests with Notes from your library's interlibrary loan department staff

Occasionally library staff will communicate information about your request in the request Notes area. To alert you, you will see something like * SEE REQUEST NOTES preceding the title.

ILL Number:	9107365
Author:	Hoffman, Mary 1945-;Binch, Caroline
Title:	* SEE REQUEST NOTES Amazing Grace
Status:	New
Circulation Status:	
Needed by:	22 Sep 2011
Pickup Location:	Aurora - Main

You can see the request in more detail by selecting the "Title" hot link or  icon. Scroll down to the Notes section to see information provided by staff at your library.

Notes (1)	
1:	[/ REQUEST] This item is locally held. Please call or visit the library to borrow our local copy. Your request for an ILL has been cancelled. JP

Example of request Notes area, with information from library staff

Troubleshooting

Check your browser version

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

Zportal 5.0 is supported on the following web browsers:

- Internet Explorer 7.0
- Firefox 2x
- Firefox 3x
- Firefox 2.0 Mac
- Safari 2.0 MAC X

Browser navigation buttons

The browser <BACK> button can not be successfully used to navigate. Use Zportal navigation buttons.

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 click on **Save** button.

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

Edit Account Details

User ID: OAU-TEST

Password:

Confirm Password: Update Password

First Name(s): Darla

Last Name: Jones

Email Address: djones@sympatico.ca

Category: Auto Authorized Patron

Joining Date: 10 Feb 2009


Banned in VDX: No

Default Pickup Location: Aurora - Main

Screen where you can change your password.

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.

My Library's Interlibrary Loan Department Contact Information	
	Telephone: Email: Hours: