



# **VDX Send User Alert & Site Actions**

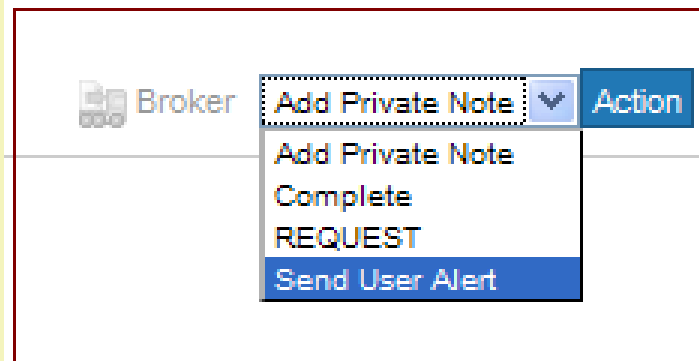
21 October 2010

# Send User Alert Overview

- **Send User Alert Facts**
- **Example of Send User Alert notification**
- **User Alert Message Destinations**
- **Send User Alert usage, by campus, through October 2010**
- **Questions?**

# SEND USER ALERT FACTS

“Send User Alert” is an action designed to trigger an “ad hoc” user alert



It is available for use on any borrowing requests that have not been Completed, and is available via bulk action. The Send User Alert action does not change the status of the requests to which it is applied

**Bulk Action / Authorisation**

Enter ILL numbers, separated by blanks or commas

**ILL Numbers**

4155803  
4171944  
4173262

Select either an action, authorisation status or process status for all the requests

**Action** Send User Alert

**Authorisation Status**

**Process Status**

**Action** [Reset Form](#)

# In VDX production, the “Ad Hoc” user alert has been created and enabled for all campuses

The screenshot displays the Workspace Manager interface. On the left, the Selection Manager tree shows the navigation path: Search > New > ILL Setup > User Alerting > ILL User Alerts. The main pane shows a list of alert descriptions, with 'UB1 Send User Alert' selected and highlighted in blue. Below the list, the configuration details for this alert are shown, including its actions, message format, and enabled status. A red oval highlights the configuration details section.

Description
Send User Alert (predefined)
Test
UB1 Blocked
UB1 Cancel UCB Owns
UB1 CancelNonCirc
UB1 CancelTextbook
UB1 CancelTooRecent
UB1 CancelUnableLocCited
UB1 DocFetch Alert
UB1 First Overdue Notice
UB1 LibraryUseOnly
UB1 MediaResCenter
UB1 Recall
UB1 Second Overdue Notice
<b>UB1 Send User Alert</b>
UB1UserAlert - Direct to Patron Standard
UCR ScienceEmailAlert
UD1 DocFetch Alert
UD1 IFLA/ALA MESSAGE
UD1 MESSAGES TO PATRONS
UD1 Send User Alert
UD2 DocFetch Alert
UD7 DocFetch Alert
UI1 DocFetch Alert
UI1 RequestReceived Test Email Alert
UI1 Send User Alert
UI1 Test
UI1 VDX Messages
UI2 DocFetch Alert
UI2 ReceivedEmailAlert

**ILL Alerts**

Description	Actions	Message format	Enabled
UB1 Send User Alert	Alert trigger Send User Alert, Processed	UB1 Send User Alert	Yes

**Domain Links**

Locations	Users	User Cats
UCB ILS		

The Message Format tied to each Ad Hoc alert is configurable by campus or ILL unit. The “special programming” (shown below) enables the “ad hoc” aspect of the alert

```
S "Concerning your ILL request listed below:"  
B1  
S "ILL No.: %s" _TRANSSTORE_illNo  
F "Title: %s" Title  
F "Author: %s" Author  
F "Publisher: %s" Publisher  
F "Date: %s" Date  
F "Article or Chapter Author: %s" Article Author  
F "Article or Chapter Title: %s" Article Title  
F "Volume: %s" Volume  
F "Pages: %s" Pages  
F "Part Pub. Date: %s" Part Pubdate  
B2  
S "NOTES: %sv" _TRANSSTORE_illPatronNotes  
B2
```

Thus, the information typed into the “Patron Note” field during a Send User Alert action is included in the email sent

ILL Request

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Action: Send User Alert

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[Send](#) [Reset](#)

Our Numbers 4155803, 4171944, 4173262

Notes

Patron Note

Private Note

[Send](#) [Reset](#)

# Example of a “Send User Alert” email as seen by the end user

**Subject: Your ILL Request: UPDATE**

For inquires please email: [ill@library.ucsb.edu](mailto:ill@library.ucsb.edu)

Concerning your ILL request listed below:

ILL No.: 3765821  
Title: G Protein-Coupled Receptors  
Author: Siehler, Sandra.;Milligan, Graeme.  
Publisher: Cambridge University Press  
Date: 2010.

**Ad Hoc note**

NOTES: This is very recent publication and all potential lenders contacted have indicated that this item is either in-use or non-circulating. Please re-submit your request in a few months if the item is still needed.

If you have questions about this notice you may forward an e-mail inquiry to [ill@library.ucsb.edu](mailto:ill@library.ucsb.edu) or phone us at 805-893-3436. (Please do not reply to the sending email address.). Holidays aside, we are available Monday-Friday from 8:00 a.m. to 5:00 p.m. You may also visit our website <http://www.library.ucsb.edu/depts/access/ill.html> for further information about Interlibrary Loan

Interlibrary Loan Borrowing  
UCSB Davidson Library  
[ill@library.ucsb.edu](mailto:ill@library.ucsb.edu)  
Phone: 805-893-3436

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# Message Destinations

As with all user alerts in VDX 4.1, the message is sent direct to the email addresses contained in the record. If there are no email addresses in the record, the message is sent to the end user's email addresses contained in his / her VDX user account. **The email addresses that show up in a "Send User Alert" action on a single record are those currently found in the user's VDX account, and may not reflect the email addresses found in the record. This may or may not be a bug.**

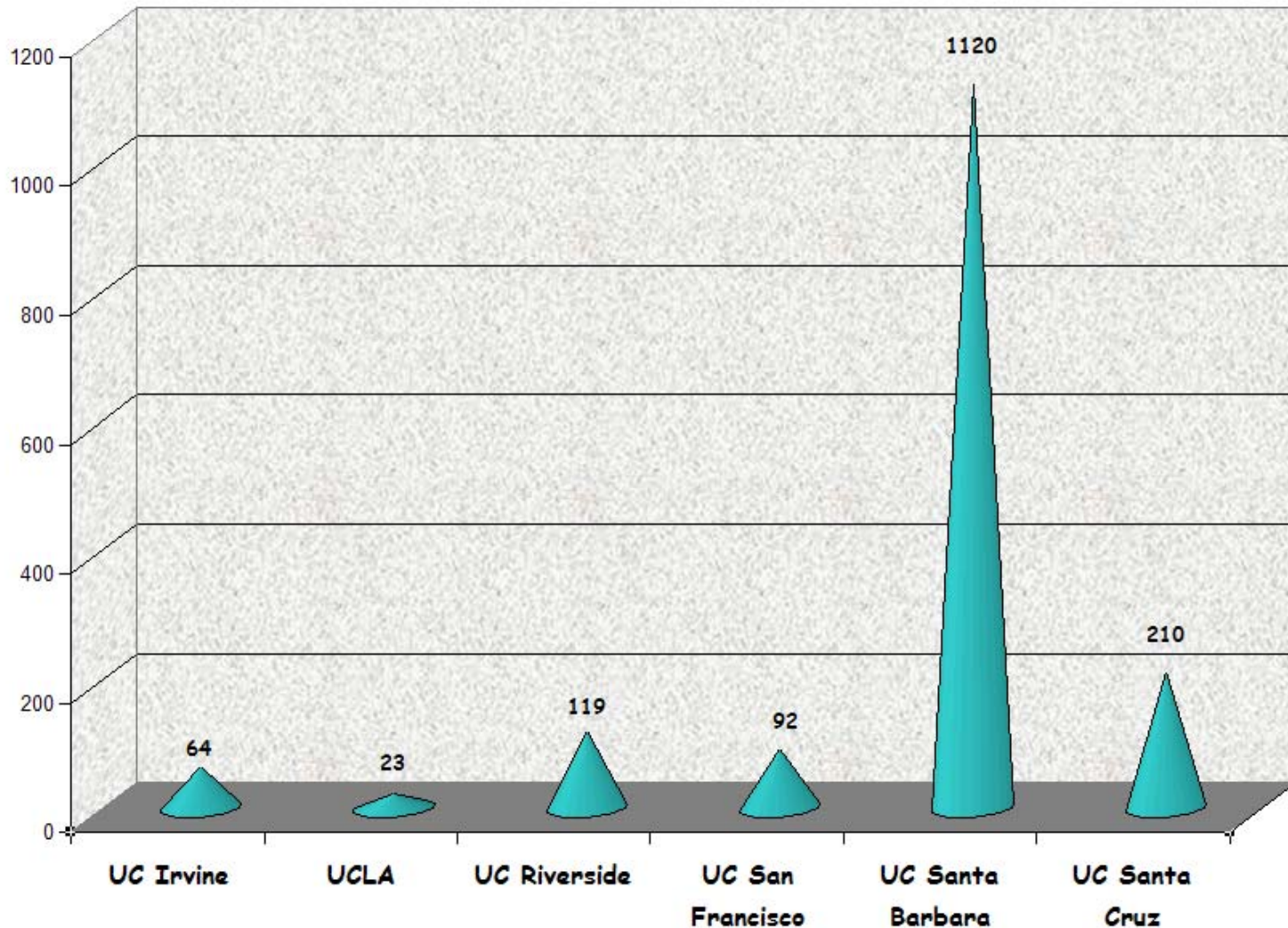
**Action: Send User Alert**

[Send](#) [Reset](#)

**Request Details**

<b>VDX Number</b>	4110667
<b>Our Number</b>	4110667
<b>Their Number</b>	4110670
<b>Status</b>	Received
<b>Title</b>	Then we came to the end : a novel
<b>Author</b>	Ferris, Joshua
<b>Patron Name</b>	Hathaway, Scott J (Staff)
<b>Patron Email address</b>	hathaway@library.ucsb.edu hathaway.sj@gmail.com

# Send User Alert usage by campus through October 2010



**Questions?**

# Site Actions Overview

- What are Site Actions?
- Who creates and configures them?
- Known issues?
- UC Wide Site Actions
- Campus Specific Site Actions
- Examples of Site Actions in the Audit Trail
- Questions?

# What are Site Actions?

- **Primary purpose: to trigger User Alerts**
- **Does not change the status of a request (does not cause *ILL* messaging to occur)**
- **Replacement for Process Statuses as User Alert triggers**

## Benefits over Process Status alerts

- **Larger number available (not limited to a single character key)**
- **Repeatable**
- **Can be specific to a request status or statuses**
- **Can be restricted by campus**
- **Recorded in the Audit Trail**
- **Process Statuses will not be available in future releases of VDX**

# Who creates and configures them?

- **System Administrator (CDL) creates the Site Action upon request by campus or ILL unit**
- **Bureau Administrator configures campus specific behavior (ILL Alert and Message Format)**

# Known issues?

- Campus specific Site Actions cannot be made available for bulk action. If bulk action is enabled for campus specific Site Actions, it shows up for all campuses in the bulk action menu (BUG)
- Using a Process Status alert on a request that has previously had a Site Action alert applied to it causes the Site Action alert to be re-sent (BIG BUG). This bug currently occurs with “Send User Alert”
- This incompatibility rather forces our hand into migrating from Process Statuses to Site Actions for User Alert triggering

Virtually any number of Site Actions can be created. As with **Process Statuses**, efforts can be made to name the Site Action to reflect the type of user alert that it will trigger. *At this time, “campus specific” Site Actions cannot be made available via bulk action. The hope is that this feature will be available in future releases of VDX*



# UC Wide Site Actions

A set of Site Actions will be created for use in bulk action and for use by all campuses. The challenge will be to decide upon and compile a useful set (**ILL Operations Team proposes, IAG approves?**)

**Bulk Action / Authorisation**

Enter ILL numbers, separated by blanks or commas

**ILL Numbers**

Select either an action, authorisation status or process status for all the requests

**Action**

**Authorisation Status**

**Process Status**

- Renew
- Renew Answer-No
- Renew Answer-Yes
- REQUEST
- Resend Last Message
- Returned
- Send Public Note
- Send User Alert
- Shipped
- Terminate Request
- UC Billing Notice
- UC Copy Received
- UC Loan Received
- UC Overdue Notice
- UC Recall
- UC Renewal Notice
- UC Send DocFetch Alert
- Unreceive
- Unship

# Campus Specific Site Actions

Campus specific Site Actions can be created for a single bureau (example: will be available on the “Action” menu for all UCLA units). Below is an example of a Site Action created for UCLA YRL. In this case, the Site Action will be available only on requests with the status of “Idle” or “Not Supplied”. The naming convention will be the unit symbol followed by a specified description.

<b>ILL Site Actions</b>	
Action code	LA01
Short Desc	ULA1 PR1
Long Desc	ULA1 Progress Report 1
Bulk Action Disabled?	Yes
Available to User?	Yes
ILL Statuses	Idle Not Supplied
Resource Groups	UCLA Bureau Resource Group


# This Site Action is available on “Idle” and “Not Supplied” requests...

3765799 : 3765799 / 3765799 \*\* ULA1 / OCLC - Direct Request

**4 Canadian playwrights: Robertson Davies, Gratien Gélinas, James Reaney, George Ryga.**

Moore, Mavor, 1919- | ISBN: 0039299902;97

**Notes:** CDL test payment type (dbb)

**Status:** Idle **Authorisation:** Check Manual **Last Action:** REQUEST: 08 Oct 2010 **Rota:** 1 of 1 

 Broker

- |                        |   |        |
|------------------------|---|--------|
| Add Private Note       | ▼ | Action |
| Add Private Note       |   |        |
| Complete               |   |        |
| REQUEST                |   |        |
| Send User Alert        |   |        |
| Terminate Request      |   |        |
| ULA1 Progress Report 1 |   |        |

End of Results


Number of Results: 1

3763139 : 3763139 \*\* ULA1

**Music from Disney's California adventure**

**Notes:** OCLC Responder Specific Reason: 1. Request matched profile VDX./2. No lenders or not enough lenders, OCLC #: 244247103

**Status:** Not Supplied **Authorisation:** Check Manual **Last Action:** REQUEST: 08 Mar 2010 **Rota:** 1 of 1

 Broker

- |                              |   |        |
|------------------------------|---|--------|
| Add Private Note             | ▼ | Action |
| Add Private Note             |   |        |
| Complete                     |   |        |
| Local Change Request Details |   |        |
| REQUEST                      |   |        |
| Resend Last Message          |   |        |
| Send User Alert              |   |        |
| ULA1 Progress Report 1       |   |        |

End of Results

Number of Results: 1

... but not on requests with any other status:

3763131 : 3763131 / ILLNUM:63583617 \*\* ULA1 / OCLC - Direct Request

**"I love Lucy"**

Ball, Lucille | ISBN: 9781415711552

**Notes:** OCLC Intermediary Control: Current (EYP) - Status:, needBy=18-MAR-2010 OCLC #: [79419138, 84679844]

**Status: Pending:** *Authorisation: To be Acknowledged* *Last Action: Status Or Error Report-ind.: 08 Mar 2010* *Rota: 1 of 1*

 Broker

- Action**
- Add Private Note
  - Add Private Note
  - Cancel
  - Complete
  - Cost Adjustment
  - Local Change Request Details
  - Received
  - Resend Last Message
  - Send Public Note
  - Send User Alert
  - Terminate Request
  - UC Copy Received
  - UC Loan Received

**End of Results**

Number of Results: **1**

# Examples of Site Actions in the Audit Trail

## History

### Lender (Responder)

[UCM: UCM Main Library](#)

[UCM: UCM Main Library](#)

[UCM: UCM Main Library](#)

[UCM: UCM Main Library](#)

[UCM: UCM Main Library](#)

[UCM: UCM Main Library](#)

[UCM: UCM Main Library](#)

[UCM: UCM Main Library](#)

[UCM: UCM Main Library](#)

### Action

UC Billing Notice

UC Recall

UC Loan Received

Received

Shipped-Indication

Conditional Reply-Yes

USB1 Patron Inquiry (Time Sensitive)

[Answer Conditional-Indication](#) - other

REQUEST

Send User Alert

**Questions?**