



VIRTUAL REFERENCE CANADA

INSTRUCTION MANUAL

NATIONAL LIBRARY OF CANADA
May 2004



INTRODUCTION

Welcome to Virtual Reference Canada (VRC), an innovative, free, bilingual service of networks libraries, archives, museums, information centres and research institutions that deliver professional and reputable reference services to Canadians.

This instruction manual will assist you in successfully using VRC. The manual highlights the major aspects of VRC participation:

- **Creating a profile**
Before your institution can submit and answer questions, you must set up an accurate, detailed profile.
- **Submitting a question**
You must code a question appropriately for it to be routed to an institution best suited to answer.
- **Answering a question**
When a question has been assigned to your institution, you must retrieve it and prepare an answer.
- **Clarifying a question**
When you receive a request for clarification for a question you have submitted, you should submit any additional information that will assist the answerer in preparing an adequate response.
- **Retrieving an answer**
An e-mail notification prompts you to retrieve an answer to a question you have asked.
- **Cancelling a question**
Should you no longer require an answer to a question you submitted through VRC, you can cancel the question. The answering institution will receive an e-mail notification informing them that they no longer need to provide an answer.
- **Following up on an answer**
After a complete answer has been provided for a question, all members involved in the question/answer transaction can send follow up messages. These could include additional information, thank you notes, etc.



GETTING STARTED

Once you have been assigned a username and password, you can start using VRC.

Begin from the VRC website <www.collectionscanada.ca/vrc-rvc>.

Select the language of your choice.

Click the <**LOGIN**> link located on the left-hand side of the page. On the Login page, enter your **Username** and **Password** and click <**Submit**>.

Once logged in, the following **Main Menu** options will be available:

- **Profile Administration**
Allows you to create and update your member profile. (This option is available only if you have Profile Administration access for your institution.)
- **Questions and Answers**
Leads to a sub-menu from which you may submit a question, answer questions assigned to you, and retrieve/review questions and answers you have submitted or received.
- **VRC Member Reports**
This option will lead you to a menu from where you will be able to generate reports that will help you analyse your institutions participation in Virtual Reference Canada.
- **Help**
To each VRC screen is associated a Help file. Click on <**Help**> to access it.
- **Logout**
Please remember to logout of VRC at the end of your session.
For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.



IMPORTANT NOTE:

When using VRC, avoid clicking on the toolbar options located at the very top of the browser page:

Français	Contact Us	Help	Search NLC	Canada Site
Introduction	About VRC	Membership	Resources	News and Events

If you click any of these options while working in VRC, any question, answer, or profile data you have entered may be lost.

CREATING A PROFILE

The first step in using VRC is the creation of a member profile. In the member profile you provide information about your institution and its services. If your institution is a member responding to questions, the profile also identifies your institution's collections, so that questions may be routed appropriately to you for answer.

Please note that information you supply in the profile defines a **VRC service profile** for your institution. It does not necessarily reflect the profile of service your institution offers otherwise (e.g., walk-in services, telephone reference, etc.).

From the **Main Menu**, select **<Profile Administration>**.

The **<Profile Administration>** elements are divided into two sections. As the heading suggests, the **<For All Members>** section should be completed by all VRC members. It includes the following fields:

- Member Information
- Alternate Names
- Contact Information
- Library/Archives Types
- Education Levels Served
- Languages Served
- Maximum Number of Questions Per Week
- Users



If your institution will be responding to questions from VRC members in addition to submitting questions, you will also need to complete the <**For Members Answering Questions**> section. It includes the following fields:

- Times Available
- Dates Unavailable
- Collection Subject Strengths

You may return to any section at any time to add, change, or delete data you have input previously. Please keep your VRC profile up-to-date, since it is the profile that supports appropriate, timely routing of questions.

When you have finished using VRC, please remember to <**Logout**>.

For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

Section 1: For All Members

Step 1

Member Information

All information entered should pertain specifically to the reference service you provide as a participant in VRC.

Member name	Usually, this will be the name of a participating institution. An individual who provides subject expertise as a VRC member, however, will place his or her own name here.
Division	Enter the name of the division in the institution providing VRC reference service, E.G., Reference Division.
Team	Enter the name of the section or team within the Division responsible for VRC reference service, e.g., E-Ref Section.
Address Language	Complete the address part of the form in the appropriate language for your institution. You may optionally choose to input both English and French-language versions of your



	address (especially useful for bilingual institutions). To do so, fill in the address part of the form in one language, and then click on the <down arrow> to change the Address Language indicator. Fill in the form again in the other language. All data entered will be saved.
Library Symbol	Assigned by the Library and Archives Canada’s Interlibrary Loan Division, library symbols facilitate borrowing between institutions, e.g., OONL. If you forgot the symbol for your library, please see < www.collectionscanada.ca/6/16/s16-202-f.html > and if you require a symbol, please see < www.collectionscanada.ca/6/16/s16-206-e.html - 3.2.2>
Time Zone / Daylight Savings	Select the time zone for your institution. Indicate whether your time zone follows Daylight Savings Time. These values support appropriate routing of questions.
Institution Status	Choose one of two options: <ul style="list-style-type: none"> ▪ Active – your institution’s status is set to “active” by default. ▪ Inactive – prevents questions from being sent to you but allows you to use VRC in other ways. You may wish to change your status to “inactive” should your institution be unable to answer questions for short periods of time. If you choose to not answer questions at all, please code <Maximum number of questions accepted per week> appropriately (see below).
Home Page URL	If your institution or service is on the Internet, provide the URL.
Fast turn around	Check the box if your institution is willing to answer questions in less than 24 hours. If you do not handle fast turn-around questions, leave this box blank. This value will be used in future query routing.
Correspondence Language	Select the language (English, French, or Bilingual) in which you prefer to receive VRC administrative correspondence (letters, e-mails, etc.).



Click **<Save>** when you have completed this section.

Step 2

Alternate Names

This option is particularly useful for multilingual institutions that have names in other languages. You can add as many Alternate Names as desired. Acronyms are also accepted. We suggest you add any names used frequently to identify your institution or service.

Complete this section if your institution is known by other names. Choose **<Add>** and complete the two required fields. Click **<Save>**.

Step 3

Contact Information

For the routing process to work efficiently, members must complete this section of the profile.

Notifications for question and answer assignments and all urgent system messages are sent via e-mail.

<E-mail> identifies the mailbox to be used for receipt of all incoming VRC notification messages for questions assigned, answers received, and for any urgent administrative messages. We strongly recommend that this e-mail address be for a mailbox that can be monitored by all your VRC staff, so that urgent system messages will be seen. For example, a library can use **<reference@library.ca>** as its VRC mailbox while the primary contact mailbox is **<john.smith@library.ca>**.

<Contact Method> is the preferred method of contact for troubleshooting, etc.

The **<Primary Contact>** is the person who directs VRC participation in your institution. The **<Secondary Contact>** acts as a backup if the Primary Contact individual is not available.

Click **<Save>** when completed.

Step 4

Library/Archives Types

Identify your institution type. Choose **<Add/Edit>** to input library or archives types.



You may select as many types as needed to define your institution by checking the appropriate boxes.

Library Types

- Aboriginal Organization
- Academic
- AskA Service
- Corporate
- Government
- Law
- Medical
- Museum
- National
- Public
- Research
- School
- Special
- Virtual Library
- Vocational/Technical

Archives Types

- Aboriginal Organization
- Academic
- Artistic/Cultural Organization
- Corporate
- Educational Organization
- Ethnic Organization
- Government – National
- Government – Provincial/Territorial
- Government – Regional/Local
- Historic Site
- Historical Society
- Medical
- Military
- Museum
- Professional Association
- Religious Organization
- Social Service Organization

Click <Save> when completed. A list of your selected types will be displayed.



To modify your selection click <**Delete**>.

Step 5 Education Levels Served

Click <**Add/Edit**> to input the Education Levels served by your institution.

Select all levels for which you will answer questions in VRC by checking the appropriate boxes.

PreSchool
Primary/Elementary
Secondary
College/CEGEP/Undergraduate
Masters/Ph.D.
Adult
Professional/Specialist

Click <**Save**> when completed. A list of your selected education levels will be displayed.

To modify your selection click <**Delete**>.

Step 6 Languages Served

Note that Languages Served designates the languages in which you provide reference services, not the language of materials held in your collection. Click <**Add/Edit**> to input the languages in which you are willing to provide VRC answers.

Select the languages you wish to add from the list by checking the appropriate boxes.

Click <**Save**> when completed. A list of your selected languages will be displayed.

To modify your selection click <**Delete**>.

Step 7 Maximum Number of Questions Per Week

Use this figure to specify the maximum number of questions your institution will accept for answering per week. (The VRC week runs from Monday to Sunday.) If your institution will be submitting questions only, this number must be set to **0**.



Depending on the number of questions in circulation, you may receive fewer questions than your specified maximum, although you will never receive more than your specified maximum.

Click <**Save**> when completed.

Note: If your institution will be inactive for short periods of time, please use the <**Institution Status**> setting in <**Member Information**> to indicate your status, rather than changing this number.

Step 8

Users

Choose <**Add**> to input any staff members who will be involved with VRC at your institution. You may add as many users as desired.

<**Member Name**> is the name of your institution.

<**User Name**> and <**User Password**> allow you to create the login name and password for the user.

<**User Type**> specifies the level of access for the user -- Profile Administration Privilege, or Normal Privilege.

<**User Language**> is the preferred working language of the user.

<**User Status**> specifies whether the user is active or inactive.

Click <**Save**> when completed.

Section 2: For Members Answering Questions

Step 1

Times Available

This section details when your institution will be available each week to work on VRC answers and monitor the VRC mailbox for incoming questions. Your institution may be open for business from 9:00 a.m. to 5:00 p.m. daily, but your staff might only be available to work on VRC each afternoon from 2:00 p.m. to 4:30 p.m. In this case, you would input 2:00 p.m. to 4:30 p.m. (Holidays, etc., are dealt with in Step 2, below.)



Click **<Add>** to input Times Available.

Click **<Save>** when completed.

Step 2

Dates Unavailable

Dates Unavailable lists the days your institution is unavailable for VRC participation. This commonly will be holidays or other days when the institution is closed.

Click **<Add>** to input Dates Unavailable.

Please select both the **<Start Date>** and **<End Date>** fields from the drop-down list

Click **<Save>** when completed.

Step 3

Collection Subject Strengths

Questions must be coded with a Subject Class and, if desired, a Subclass to be routed appropriately by VRC. The **<Collection Subject Strengths>** section is at the heart of VRC’s ability to match an incoming question with an institution having a collection that will support an appropriate level of answer.

It is important to take the time required to assess your collection’s strengths and to complete this section of the member profile.

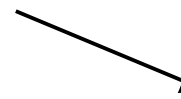
Currently, Virtual Reference Canada uses an adaptation of the Library of Congress Classification System.

The **<Collection Subject Strengths>** link will take you to the list of available subject classes.

You should edit individually each class that you wish to add to your profile. Click on **<Add/Edit>** to begin.

FC - Canadian History

Class	Description	Collection Depth		
				Add/Edit
Not Selected				





Once you have selected a class, the screen will display that class, and available subclasses. In order to select appropriate subclasses, click the checkboxes next to those that you want to add. Only those that have been checked will be added to your profile. If you wish to add all possible subclasses, click the <Select All> checkbox at the top of the screen.

FC - Canadian History

[Add/Edit Subject](#)

Class	Description	Collection Depth	Add/Edit Geo Area	<input type="checkbox"/>	
FC	Canadian History	5 Comprehensive		<input type="checkbox"/>	Delete
FC 36	Geographic names	5 Comprehensive		<input type="checkbox"/>	Delete
FC 41-49	Immigration literature	5 Comprehensive		<input type="checkbox"/>	Delete

Canadian History

Class	Description	<input type="checkbox"/>	Collection Depth
FC	Canadian History	<input checked="" type="checkbox"/>	3 Instructional
FC 36	Geographic names	<input type="checkbox"/>	1 Minimal
FC 41-49	Immigration literature	<input type="checkbox"/>	1 Minimal

Step 3b

Next, select a <Collection Depth> for each subclass you wish to add to your profile. Collection Depth indicators are based on those developed by the Research Libraries Group as part of the “Conspectus” project. Below are broad definitions of the collection depth indicators:

1 – Minimal Information	Collections that support minimal inquiries about a subject through a limited range of general resources, including monographs and reference works.
2 – Basic Information	Collections that introduce and define a subject, indicate the varieties of information available elsewhere and support the needs of general users.
3 – Instructional	Collections that provide information about a subject in a



Support	systematic way to support the needs of general users, but at a level of less than research intensity.
4 – Research	Collections that contain the major source materials required for doctoral study and independent research.
5 – Comprehensive	Collections in a specific field of knowledge that strive to be exhaustive.

You can assign the appropriate level by selecting it from the next to the desired class/subclass:

Canadian History

Class	Description	<input type="checkbox"/> Select All	Collection Depth
FC	Canadian History	<input checked="" type="checkbox"/>	3 Instructional
FC 36	Geographic names	<input type="checkbox"/>	1 Minimal
FC 41-49	Immigration literature	<input type="checkbox"/>	1 Minimal

VRC now allows you to assign the same level to multiple subclasses at the same time. You do so by selecting the desired level from the <Select All> at the top of the screen.

Please note that the <Select All> drop-down list will change all selected subclasses to the same depth. You may wish to use <Select All> to choose a depth appropriate for the majority of your subclasses, and then assign different depths to individual subclasses as necessary.

Where available, clicking <More> will allow you to choose a depth for a sub-subclass. (Clicking <More> will also save any work done to this point.)

FC 2001-2020	Atlantic Provinces	<input type="checkbox"/>	1 Minimal	More
FC 2021-2049	Maritime Provinces	<input checked="" type="checkbox"/>	3 Instructional	More
FC 2050	Maritime Provinces society (ethnic, religious groups, etc.)	<input type="checkbox"/>	1 Minimal	More
FC 2151-2199	Newfoundland and Labrador	<input type="checkbox"/>	1 Minimal	More



The procedure is the same as for selecting depths for the subclasses.

Click <Save> when complete to save your current profile information, and return to the list of subject classes. (As coding your profile can be a lengthy process, you may wish to save frequently.) <Reset> will take you to the most recently saved profile state. If you wish to return to the list of subject classes without saving your work, click on the <Collection Subject Strengths> link.

Step 3c

Next, on the Collection Subject Strengths screen, note the <Add/Edit Geo Area> column to the right:

FC - Canadian History			Add/Edit Subject	
Class	Description	Collection Depth	Add/Edit Geo Area	<input type="checkbox"/>
FC	Canadian History	5 Comprehensive	<input type="checkbox"/>	Delete
FC 36	Geographic names	5 Comprehensive	<input type="checkbox"/>	Delete
FC 41-49	Immigration literature	5 Comprehensive	<input type="checkbox"/>	Delete

You may add as many Geographic Areas as desired for each Subject Class you have defined. This code is useful for highlighting strong area collections in history, literature, etc.

The following steps should be applied to a single Subject Class (ie. **B Philosophy**) and its subclasses.

First select the Subject class and subclass(es) to which you wish to add Geographic Areas. Place a checkmark (✓) in the checkbox next to each. If you wish to add the same Geographic Areas to all your defined subclasses, click the checkbox at the top of the column.

Click <Add/Edit Geo Area>.

On the <Geographic Area> screen, click <Add Geo Area>.



Geographic Area

User Name: nicolassavard Member Name: Library and Archives Canada

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 [Back To Collection Subject Strengths](#)

FC - Canadian History

FC - Canadian History

Geo Area - Not Selected

 [Back To Collection Subject Strengths](#)

The selected Subjects display at the top of the <Add/Edit Geographic Area> screen.

FC - Canadian History

FC - Canadian History

[Back To Geographic Area](#)

Geographic Area >> World

Geographic Code	Geographic Value	<input type="checkbox"/> Select All	
f	Africa	<input type="checkbox"/>	More
fc	Africa, Central	<input type="checkbox"/>	
fe	Africa, Eastern	<input type="checkbox"/>	
fq	Africa, French-speaking Equatorial	<input type="checkbox"/>	
ff	Africa, North	<input type="checkbox"/>	
fh	Africa, Northeast	<input type="checkbox"/>	

To select a Geographic Area, place a checkmark (✓) next to all the desired areas from the alphabetical list provided. If you cannot find a specific country or region, go to the



continent (i.e. **North America**), and click **<More>** to see a more detailed list of geographic choices. Once you have made your selections click **<Save>** to return to the previous page. If your selections are from subclass lists generated from clicking the **<More>** link, you may need to continue to click **<Save>** until you have returned to the top-level page (**Geographic Area >> World**).

If you wish to add all possible Geographic Areas in a selection list, click the **<Select All>** checkbox at the top of the screen and click **<Save>**.

The **<Geographic Area>** screen displays the Subjects and Geographic Areas selected.

Geographic Area

User Name: nicolassavard **Member Name:** Library and Archives Canada

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[Add/Edit Geo Area](#)
[Back To Collection Subject Strengths](#)

FC - Canadian History

FC - Canadian History		
n	North America	Delete

[Add/Edit Geo Area](#)
[Back To Collection Subject Strengths](#)

Geographic Areas will also display in your member profile with Collection Subject Strengths.

Click **<Back to Collection Subject Strengths>** to return to the Collection Subject Strengths screen where you can add Geographic Areas to other subjects as appropriate.

The **<Collection Subject Strengths>** section is one of the most important elements of the member profile. It is essential to appropriately code your **<Collection Subject Strengths>** to ensure that VRC works in the most efficient way possible. If you wish, you can accomplish this task in more than one session. At each step, VRC will save your profile.

When you have finished using VRC, remember to click on **<Logout>**.



For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

*T*HE QUESTION MENU

This menu section allows you to submit questions to VRC, submit answers to questions assigned to you, view questions that have been assigned to you, and view answers to questions you have submitted. You can request clarification of questions that have been assigned to you. You also have the option of changing the deadline for a question you have submitted, or cancelling the question if a response is no longer required

*S*UBMITTING A QUESTION

From the **Main Menu**, select the heading **<Questions and Answers>**.

Step 1

Click the **<Submit a Question>** option.

Note that only one question box is provided on the question form. We suggest you ask only one question, or only closely-related questions, in each VRC submission to have an efficient response from the answering institution. Submitting multiple questions on a variety of topics in one VRC question form is discouraged. Please submit separate VRC requests for multiple questions.

Step 2

The **<Questions and Answers>** field and all fields designated by an asterisk (*) are required. These fields are explained below.



*Language of question	<p>Specify the language of the question you submit. This supports routing to an institution that offers service in that language.</p> <p>To select a language, click on the down arrow to the right of the field. Choose either English or French.</p>
*Question	<p>Enter the question here. Phrase the question in a clear and precise manner to avoid any confusion or ambiguity for the answerer. You can write up to approximately fourteen pages.</p>
Permission to Archive	<p>This allows you to specify, on behalf of the end-user, their consent for archiving the question in the question database for possible future re-use. Check the box if permission is granted.</p>
*Class / Subclass / Sub-subclass	<p>This field defines the subject of the question. All questions entered into the application must be assigned a subject classification so the question can be routed to an appropriate institution.</p> <p>Clicking on the <Class> button will open a pop-up window where you can select an appropriate class for your question. Once you have selected a class, the <Subclass> and <Sub-Subclass> buttons will allow you to further specify your question's subject.</p>
*Education Level	<p>Education Level refers to the educational level attained by the asker of the question. Coding this field gives answering institutions an idea of the appropriate level of information required in the response.</p> <p>To select an educational level, click on the down arrow. Educational levels include: Preschool, Primary/Elementary, Secondary, College/CEGEP/Undergraduate, Masters/Ph.D., Adult or Professional/Specialist.</p>
*Turnaround Time	<p>Turnaround time is the date and time the answer is needed by. To select a turnaround time, click on the down arrow and choose <24 hours, <48 hours or <7 days.</p>



Keywords	In this optional field, you may add additional keywords that further define the question. Use commas to separate keywords entered in this field. Keywords may eventually be used for indexing and in retrieving information from the database of stored questions and answers.
Reasons for Research	<p>This optional field lets you specify the context within which the information is required. This field is intended to help the answering institution formulate an appropriate response.</p> <p>To select a reason for research, click on the drop-down list and choose from: Educational assignment, Classroom instruction, General interest, Job assignment, or Other.</p>
Geographic Area 1,2,3	<p>Code the Geographic Area if the question has a strong geographic component.</p> <p>Clicking on the <Geo Area 1> button will open a pop-up window where you can select the appropriate region. Once you have filled in the <Geo Area 1>, you will be able to select sub-areas with the <Geo Area 2> and <Geo Area 3> buttons as necessary.</p> <p>For instance, if a question deals with education in Ontario, you would code the Subject Class/Subclass appropriately and add the geographic area coding for Ontario. In this example, the first level would indicate North America, the second Canada, and the third Ontario.</p>
Sources Consulted	Please list sources already consulted so that duplication of effort by the answering institution may be avoided.
User ID Number, Barcode, etc. (Optional)	<p>The <User ID Number, Barcode, etc.> section links the question to the user. This field is optional.</p> <p>This field displays the end-user’s ID so that the submitting institution may connect an incoming answer with the person who asked the question. The ID can be a library card barcode, a number, or other data. We advise against</p>



	placing in this field any information of a personal nature (such as name or e-mail address) that can be used to specifically identify an end-user.
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Step 3 Click <**Send**> when you are ready to submit your question.

Step 4 Once your question has been submitted, you will receive a confirming e-mail. Note that VRC will not (re)assign to you questions you have submitted, questions you have received and partially answered, or questions you have rejected.

When you have finished using VRC, please remember to <**Logout**>.

For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

*S*UBMITTING AN ANSWER

When you have been assigned a question to answer, you will receive an e-mail notification specifying the identification number of the assigned question. To answer the question, logon to the VRC web site and retrieve the question using the question identification number.

From the **Main Menu**, select <**Questions and Answers**>.

Step 1 Click on the <**Submit an Answer**> option.

Step 2 Click on the down arrow located below the <**Question in progress**> field and select the appropriate question number; the number will automatically be displayed in the <**Question No.**> field. Alternately, enter the question identification number in the <**Question No.**> field and click <**Retrieve**>.



Question in progress	Click on the down arrow of the < Question in progress > field and select the appropriate question number to retrieve a question.
Question No.	Input the question identification number into the < Question No. > field to retrieve a question.

Note: You can access only those Question and Answer sets in which you have been involved as either submitter or answerer.

Step 3

To read the question on the retrieved form, scroll down to the large question field.

As you scroll down, you will find other relevant question details, such as the <**Status**>, <**Entry Date**>, <**Deadline**>, and <**Language**> of the question.

The <**Action Required by**> field displays the member whose turn it is to carry out an action. Also present are the <**Subject Classification**>, <**Educational Level**>, <**Sources Consulted**>, <**Reason for Research**>, and <**Geographic Area**> fields.

Status	The status of the question with respect to its completion (unanswered, partial answer, rejected/redistributed, etc.).
Entry Date	The date the question was submitted.
Deadline	The date and time by which an answer is required.
Language	The language of the question and the anticipated language of the answer.
User ID Number, Barcode, Etc.	<p>The <User ID Number, Barcode, etc.> section links the question to the user. This field is optional.</p> <p>This field displays the end-user's ID so that the submitting institution may connect an incoming answer with the person who asked the question. The ID can be a library card barcode, a number, or other data. We advise against placing in this field any information of a personal nature (such as name or e-mail address) that can be used</p>



	to specifically identify an end-user.
Action Required By – Member Name	The member whose turn it is to carry out an action, such as answering a question, clarifying a question, etc.
Class	The general subject classification of the question. Based on an adaptation of the Library of Congress Subject Classification scheme.
Subclass	The subclass of the question.
Sub-Subclass	The sub-subclass of the question.
Sources Consulted	Sources already consulted by the submitter of the question in the preliminary search for an answer.
Reason for Research	The context within which the information is required (i.e. Educational assignment, Classroom instruction, General interest, Job assignment, Other).
Education Level	Educational level attained by the asker of the question (i.e. Preschool, Primary/Elementary, Secondary, College/CEGEP/Undergraduate, Masters/Ph.D., Adult or Professional/Specialist). It helps the answering institution formulate an appropriate answer.
Geographic Area 1,2,3	A geographic area that is a component of the question. For instance, if a question deals with Ontario, the first level will indicate North America, the second, Canada, and the third, Ontario.
Question History	This is a read-only field, which displays the question and any clarifications or additions to it that may have been made.
Answer	The answer to the question is input here. You can write up to approximately fourteen pages.

Step 4

The question appears in the <**Question History**> field, along with any clarifications or additional comments added by the submitter.



Step 5

Type your response into the **<Answer>** box. You can write up to approximately fourteen pages.

Step 6

Before submitting an answer, select a status from the **<Status/Action>** box by clicking on the down arrow. This field must be coded, or the submission will not be accepted. The following options are available:

Complete	Code the question <Complete> if you have fully answered the question.
Save Draft	Select <Save Draft> to save a draft copy of the question you are working on. To complete the answer at a later time, retrieve the question using its identification number.
Partial Answer	Code <Partial Answer> when only part of a question has been answered or when you feel the answer could be improved by another VRC participant.
Reject / Redistribute	Select this option when you cannot answer a question for any reason. The question will then be forwarded to another VRC participant.
Request Clarification	Select <Request Clarification> if you would like the asking institution to provide further information or additional details. You will receive another notification e-mail when they have done so.

Step 7

When you have finished answering, click the **<Submit>** button at the bottom of the screen.

You will receive a message confirming that your answer has been submitted.

If the answer is not accepted and returns to you, however, review what you have entered. This will happen if you forget to set the **<Status>**, for example. Verify your answer and coding, and resubmit your response.



Overdue Notices to the Answering Institution

If you do not submit an answer by the assigned due date, an e-mail notification reminding you that your answer is overdue will be sent one day after the deadline. If the question remains unanswered five days after the deadline, a second notice will be sent. **If you are unable to answer the question, please reject it so that the question can be assigned to another institution.** After eight days, if no action has been taken on the part of the asking library to extend the deadline or cancel the question, and no answer has been submitted, the question will be reassigned to the institution acting as the VRC Oncall institution. At this point you will receive a final e-mail stating that the question was reassigned and that you are no longer required to answer this question.

Overdue Notices to the Asking Institution

If you do not receive an answer by the due date, an e-mail notification reminding you that your question remains unanswered will be sent two days after the deadline. As the asking library, the e-mail will prompt you to take one of three courses of action: to extend the deadline, to cancel the question or to wait for a response. If you choose to wait for a response and do not receive one by the sixth day after the deadline, you will receive second notification. If after eight days an answer has still not been submitted to your institution you should receive an e-mail from the VRC Oncall institution asking for further instructions on how to proceed with the question (cancel, extend deadline, reassign to another institution).

When you have finished using VRC, please remember to **<Logout>**.

For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

R **ETRIEVING A QUESTION**

To retrieve a question, login to the VRC web site and locate your question using the question identification number sent in the notification e-mail you received.

From the **Main Menu**, select the heading **<Questions and Answers>**.



Step 1

Click on the <View a Question or an Answer> option.

Step 2

Click on the down arrow located below the <Question in progress> field and select the appropriate question number; the number will automatically be displayed in the <Question No.> field. Alternately, enter the question identification number in the <Question No.> field and click <Retrieve>.

Question in progress	Click on the down arrow of the <Question in progress> field and select the appropriate question number to retrieve a question.
Question No.	Input the question identification number into the <Question No.> field to retrieve a question.

Note: You can access only those Question/Answer sets in which you have been involved as either submitter or answerer.

Step 3

To view the question or answer, scroll down to the question and answer fields. You will also see the fields containing other relevant details.

Step 4

When you have finished reading the question, click on <Cancel> to exit the screen.

For details on answering, see the section *Submitting an Answer*.

Please remember to <Logout> when you have finished using VRC.

For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

C

LARYFYING A QUESTION



Requests for clarification require that the asking institution add pertinent details in the question field to assist the answering institution.

If you receive an e-mail notification that a clarification is needed for one of your submitted questions, log on to VRC.

From the **Main Menu**, select the heading **<Questions and Answers>**.

Step 1

Click the **<Submit an Answer>** option.

Step 2

Click on the down arrow located below the **<Question in progress>** field and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternately, enter the question identification number in the **<Question No.>** field and click **<Retrieve>**.

Question in progress	Click on the down arrow of the <Question in progress> field and select the appropriate question number to retrieve a question.
Question No.	Input the question identification number into the <Question No.> field to retrieve a question.

Note: You can access only those Question/Answer sets in which you have been involved as either submitter or answerer.

Step 3

Use the **<Answer>** box to add additional information to the question or to refine the question in other ways.

Step 4

Select **<Request for Clarification>** from the drop-down list underneath the response box.

Step 5

When finished, click the **<Submit>** button at the bottom of the screen.

An e-mail notification will be sent to the institution that requested the clarification. They will then continue answering your question.



When you have finished using VRC, please remember to **<Logout>**.

For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

RETRIEVING AN ANSWER

You will receive an e-mail notification when a question you have submitted to VRC has been answered. Use the question identification number in the e-mail to retrieve the answered question.

From the **Main Menu**, select the heading **<Questions and answers>**.

Step 1

Click the **<View a Question or an Answer>** option.

Step 2

Click on the down arrow located below the **<Question in progress>** field and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternately, enter the question identification number in the **<Question No.>** field and click **<Retrieve>**.

Question in progress	Click on the down arrow of the <Question in progress> field and select the appropriate question number to retrieve a question.
Question No.	Input the question identification number into the <Question No.> field to retrieve a question.

Note: You can access only those Question/Answer sets in which you have been involved as either submitter or answerer.

Step 3



Scroll down to the <Answer> box to read the submitted answer. Note that the status of the answer will have been set to <Complete> or <Partial Answer>. If you are satisfied with the information supplied, you may now provide the answer to your user.

Step 4

If the answer is not as complete as you would like, however, you may resubmit the question. Change the question status in the status box at the bottom of the screen to <Re-Submit> and then click the <Submit> button. The question will re-enter VRC and will be redistributed to another member.

When you have finished using VRC, remember to click on <Logout>.

For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

C HANGING A DEADLINE

If the asking institution determines that the original deadline for responding to a question needs to be changed (because the need for a response is either more or less urgent than originally thought), VRC provides the option of attaching a new deadline to a submitted question. To do so, log on to VRC.

From the <Main Menu>, select <Questions and Answers>.

Step 1

Select the <Change Deadline> option.

Step 2

Click on the down arrow under the <Question in Progress> field, and select the appropriate question number; the number will automatically be displayed in the <Question No.> field. Alternately, you can enter the number of the appropriate question in the <Question No.> field. Click <Retrieve>.

Question in progress	Click on the down arrow of the <Question in progress> field and select the appropriate question number to retrieve a question.
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Question No.	Input the question identification number into the <Question No.> field to retrieve a question.
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Note: You can access only those Question/Answer sets in which you have been involved as either submitter or answerer.

The question's original deadline will be displayed in the **<Deadline>** field under **<Question Information>**.

Step 3

The current date is displayed in the **<Today's Date>** field under **<Change Deadline>**. Click on the down arrow under **<Deadline Change>** to select one of the three deadline options (24 hours, 48 hours, or 7 days). The new deadline will automatically appear in the **<New Deadline>** field.

Step 4

Supply information regarding the reasons for the change in the **<Comments>** box. Click on **<Submit>** when you are finished. (If you do not wish to save your changes, click on **<Close>**.)

An e-mail notification will be sent to the answering institution, to notify them that the deadline for the question has been changed.

When you have finished using VRC, please remember to **<Logout>**. For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

CANCELLING A QUESTION

If the asking institution decides that an answer is no longer required (patron found enough information or the question was time sensitive) VRC gives you the option to cancel a question. To cancel a question, log onto VRC.

From the **Main Menu**, select the heading **<Questions and Answers>**.

Step 1



Click the **<Cancel a Question>** option.

Step 2

Click on the down arrow located below the **<Question in progress>** field and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternately, enter the question identification number in the **<Question No.>** field and click **<Retrieve>**.

Question in progress	Click on the down arrow of the <Question in progress> field and select the appropriate question number to retrieve a question.
Question No.	Input the question identification number into the <Question No.> field to retrieve a question.

Note: You can access only those Question/Answer sets in which you have been involved as either submitter or answerer.

Step 3

Enter the reason that the question was cancelled in the **<Comments>** text box appearing below the **<Question History (Read only)>** box. Please note that the **<Comments>** box is a mandatory field and something must be entered before you can continue.

Step 4

When finished, click the **<Submit>** button at the bottom of the screen. A pop up box asking you to confirm that you want to cancel the question will appear. Click **<OK>** to cancel the question.

An e-mail notification will be sent to the institution that was assigned to answer the question to advise them that the question was cancelled and no longer requires an answer.

When you have finished using VRC, please remember to **<Logout>**.

For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.



FOLLOWING UP ON AN ANSWER

After a complete answer has been provided, all members involved in the question/answer transaction can send follow up messages. These could include additional information, thank you notes, etc. To send a follow up, logon to VRC.

From the **Main Menu**, select the heading **<Questions and Answers>**.

Step 1

Click **<View a Question or an Answer>**.

Step 2

Click on the down arrow located below the **<Question in progress>** field and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternately, enter the question identification number in the **<Question No.>** field and click **<Retrieve>**.

Question No.	Input the question identification number into the <Question No.> field to retrieve a question.
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Note: You can access only those Question and Answer sets in which you have been involved as either submitter or answerer.

Step 3

Scroll down the screen and click the **<Follow Up>** button.

Note: The **<Follow Up>** button only appears after an answer is submitted with a status **<Complete>**.

Step 4

Type your follow up text in the Message box.

Step 5

You can send your message to all members who participated in the Question/Answer transaction by checking the box next to **<Send to All>**. Or, you can send your message to selected members, by checking the box(es) next to the specific member names listed.

Step 6

Click **<Submit>** at the bottom of the screen.



You will receive a message confirming that your follow up message has been submitted.

When you have finished using VRC, remember to click <**Logout**>.

For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

V *RC MEMBER REPORTS*

You can select the following reports :

Questions submitted to VRC (by month)

This report will list questions you have submitted, by month.

Questions received in VRC (by month)

This report will list questions you have received, by month.

Member participation in VRC (by fiscal year)

This report will analyse the number of questions submitted and received, while observing the status of the question and of the answer : complete, partial answer, resubmitted, rejected, late, by fiscal year.

Questions received by subject area (by fiscal year)

This report will analyse and list questions received, by main class, by fiscal year.

Overview of profile elements (by fiscal year)

This report will analyse the number of questions submitted and received by “Turnaround time”, by Education Levels” and by “Languages Served”, by fiscal year.

REPORT – QUESTIONS SUBMITTED TO VRC

From the **Main Menu**, select <**VRC Member Reports**>.



Step 1

Click on **<Questions Submitted to VRC (by month)>**.

Step 2

From the drop-down list, select a month and a year and click on **<Send>**.

Read this report in the following manner :

- **No.** refers to the line number of the report
- **Questions Submitted** indicates the VRC question number and its full text. By clicking on the VRC question number, you will be brought to **<View a question or an answer>** screen that will provide all pertinent information about this question.
- **Date Due** indicates the deadline of this question. If the status of the question is “In progress”, you will have the opportunity to change the deadline. To do this, click on the due date and you will be brought to the **<Change Deadline>** screen.
- **Date Submitted** indicates the date on which the question was submitted to VRC.
- **Status** indicates the status of the question.
- **Action Required By** indicates the name of the institution that has to provide an answer.

This report is sorted in chronological order of due date, from the oldest to the most the most recent.

By clicking on **<Back>**, VRC will bring you to the main menu of the **<VRC Member Reports>**.

REPORT – QUESTIONS RECEIVED IN VRC

From the Main Menu, select **<VRC Member Reports>**.

Step 1

Click on **<Questions received in VRC (by month)>**.

Step 2



From the drop-down list, select a month and a year and click on **<Send>**.

Read this report in the following manner :

- **No.** refers to the line number of the report
- **Questions Received** indicates the VRC question number and its full text. By clicking on the VRC question number, you will be brought to “View a question or an answer” screen that will provide all pertinent information about this question.
- **Date Due** indicates the deadline of this question. If the status of the question is “In progress”, you will have the opportunity to change the deadline. To do this, click on the due date and you will be brought to the “Change Deadline” screen.
- **Date Submitted** indicates the date on which the question was submitted to VRC.
- **Status indicates** the status of the question.

This report is sorted in chronological order of due date, from the oldest to the most the most recent.

By clicking on **<Back>**, VRC will bring you to the main menu of the **<VRC Member Reports>**.

REPORT – MEMBER PARTICIPATION IN VRC

From the Main Menu, select **<VRC Member Reports>**.

Step 1

Click on **<Member Participation in VRC (by fiscal year)>**.

Step 2

From the drop-down list, select a fiscal year and click on **<Send>**.

Read this report in the following manner :

- **Questions Submitted** indicates the number of questions your institution submitted, by month and by fiscal year. If you are comparing two complete fiscal years, you



will see the growth or decline of your participation in VRC, in percentage points. By clicking on the number/hyperlink, you will automatically be brought to the “Questions submitted to VRC” report.

- **Complete Answers Received** indicates the number of complete answers your institution has received in relation to the number of questions submitted.
- **Partial Answers Received** indicates the number of partial answers your institution has received in relation to the number of questions submitted.
- **Questions Resubmitted** indicates the number of questions your institution has resubmitted in relation to the number of questions submitted.
- **Maximum Number of Questions** indicates the maximum number of questions your institution is willing to receive per week. This is the number you entered in the “Maximum Number of Questions Per Week” screen of the “Profile Administration / For All Members” area.
- **Questions Received** indicates the number of questions your institution has received, by month and by fiscal year. If you are comparing two complete fiscal years, you will see the growth or decline of your participation in VRC, in percentage points. By clicking on the number/hyperlink, you will automatically be brought to the “Questions Received in VRC” report.
- **Complete Answers Provided** indicates the number of answers coded “Complete” your institution has submitted in relation to the number of questions received.
- **Partial Answers Provided** indicates the number of answers coded “Partial Answer” your institution has submitted in relation to the number of questions received.
- **Questions Rejected** indicates the number of questions / answers coded “Reject / Redistribute” your institution has submitted in relation to the number of questions received.

By clicking on <Back>, VRC will bring you to the main menu of the <VRC Member Reports>.

REPORT – QUESTIONS RECEIVED BY SUBJECT AREA



From the Main Menu, select <**VRC Member Reports**>.

Step 1

Click on <**Questions Received By Subject Area (by fiscal year)**>.

Step 2

From the drop-down list, select a fiscal year and click on <**Send**>.

Read this report in the following manner :

- **No.** refers to the line number of the report
- **Class** indicates the main classes used by VRC to describe the subject of a question. By clicking on the hyperlink, you will be brought automatically to the specific report for this main class. By clicking on the question number / hyperlink, you will automatically be brought to the “View a Question or an Answer” screen.
- **Number of Questions per Class, FY 200X/200X** indicates the number of questions received for each main class, by fiscal year.
- **% of Total in VRC per Class, FY 200X/200X** indicates the percentage of questions your institution has received for this class compared to the total number of questions submitted to VRC for this class.
- **Number of Questions per Class, FY 200X/200X** indicates the number of questions received for each main class, for the previous fiscal year.
- **% of Total in VRC per Class, FY 200X/200X** indicates the percentage of questions your institution has received for this class compared to the total number of questions submitted to VRC for the previous fiscal year.
- **Total** indicates the total number of questions your institution has received and the percentage that this represents for all questions received in VRC.

By clicking on <**Back**>, VRC will bring you to the main menu of the <**VRC Member Reports**>.

REPORT – OVERVIEW OF PROFILE ELEMENTS



From the Main Menu, select <**VRC Member Reports**>.

Step 1

Click on <**Overview of Profile Elements (by fiscal year)**>.

Step 2

From the drop-down list, select a fiscal year and click on <**Send**>.

Read this report in the following manner :

- **Profile Elements** indicates the mandatory fields of the VRC Web form, except the subject of the question, which is treated in a separate report.
- **Questions Received** indicates the number of questions received by your institution for this profile element, by fiscal year.
- **%Chg** indicates the percentage of growth and decline in the number of questions received for this profile element.
- **Questions Submitted** indicates the number of questions submitted by your institution for this profile element, by fiscal year.
- **%Chg** indicates the percentage of growth and decline in the number of questions submitted for this profile element.

By clicking on <**Back**>, VRC will bring you to the main menu of the <**VRC Member Reports**>.



U **SING VRC, A STEP-BY-STEP SUMMARY**

LOGGING IN

- 1) Click the <**LOGIN**> option located on the left hand side of any page of the VRC website <www.collectionscanada.ca/vrc-rvc>.
- 2) Enter your **Username** and **Password**.
- 3) Click on <**Submit**>.

CREATING A PROFILE

From the **Main Menu**, select <**Profile Administration**>.

For All Members

- 1) Select <**Member Information**>
 - a) Complete all required fields (designated by an asterisk *) as well as any additional fields.
 - b) Click <**Save**> when completed.
 - c) Click <**Profile Administration**> on the application toolbar to return.
- 2) Select <**Alternate Names**>
 - a) Click <**Add**>.
 - b) Enter an Alternate Name.



- c) Click <**Save**> when completed.
 - d) Repeat steps *a)* to *c)* for additional Alternate Names.
 - e) Click <**Profile Administration**> on the application toolbar to return.
- 3) Select <**Contact Information**>
- a) Complete all required fields (designated by an asterisk *) as well as any other relevant fields.
 - b) Click <**Save**> when completed.
 - c) Click <**Profile Administration**> on the application toolbar to return.
- 4) Select <**Library/Archives Types**>
- a) Click <**Add/Edit**> to input library or archives types.
 - b) Select all the types that describe your institution by checking the appropriate boxes.
 - c) Click <**Save**> when completed. A list of your selected types will be displayed.
 - d) To modify your selection, click <**Delete**>.
 - e) Click <**Profile Administration**> on the application toolbar to return.
- 5) Select <**Education Levels Served**>
- a) Click <**Add/Edit**> to input one or several education levels.
 - b) Select the levels you wish to add from the list by checking the appropriate boxes.
 - c) Click <**Save**> when completed. A list of your selected education levels served will be displayed.
 - d) To modify your selection, click <**Delete**>.
 - e) Click <**Profile Administration**> on the application toolbar to return.
- 6) Select <**Languages Served**>
- a) Click <**Add/Edit**> to input one or several languages.
 - b) Select the languages you wish to add from the list by checking the appropriate boxes.
 - c) Click <**Save**> when completed. A list of your selected languages served will be displayed.
 - d) To modify your selection, click <**Delete**>.
 - e) Click <**Profile Administration**> on the application toolbar to return.
- 7) Select <**Maximum Number of Questions Per Week**>.



- a) Input the maximum number of questions your institution will accept for answering per week. If you will not be answering questions, this number must be set to **0**.
 - b) Click <**Save**> when completed.
- 8) Select <**Users**>.
- a) Select <**Add**> to add new users to your institution.
 - b) Input a user name.
 - c) Input a user password.
 - d) Input the user type level.
 - e) Input the user language.
 - f) Input the user status.
 - g) Click <**Save**> when completed.

For Members Answering Questions

- 1) Select <**Times Available**>
 - a) Click <**Add**>.
 - b) Complete all fields.
 - c) Click <**Save**> when completed.
 - d) Repeat steps *a) to c)* for additional Times Available.
 - e) Click <**Profile Administration**> on the application toolbar to return.

- 2) Select <**Dates Unavailable**>
 - a) Click <**Add**>.
 - b) Complete start *and* end dates.
 - c) Click <**Save**> when completed.
 - d) Repeat steps *a) to c)* for additional Dates Unavailable.
 - e) Click <**Profile Administration**> on the application toolbar to return.

- 3) Select <**Collection Subject Strengths**>
 - a. Click <**Add/Edit**> for each class for which you wish to add subclasses to your profile.
 - b. Select the subclasses you wish to add from the list by checking the appropriate boxes. If you wish to add all available subclasses, check the <**Select All**> checkbox.
 - c. Select a Collection Depth for each subclass added. If you wish to assign the same depth to all added subclasses, use the <**Select All**> drop-down list.



- d. Where available, click **<More>** to add and assign depths for sub-subclasses. The process is the same followed for adding/assigning depths for subclasses.
 - e. Click **<Save>** when completed.
 - f. Scroll down and locate the Subclass(es) you have entered.
 - g. Place a checkmark (✓) in the checkbox next to each the Subject class and subclass(es) to which you wish to add Geographic Areas (not mandatory). If you wish to add the same Geographic Areas to all your defined subclasses, click the checkbox at the top of the column.
 - h. Click **<Add/Edit Geo Area>**.
 - i. On the **<Geographic Area>** screen, click **<Add Geo Area>**.
 - j. Select the Geographic Areas you wish to add from the list by checking the appropriate boxes. If you cannot find a specific country or region, go to the continent (i.e. **North America**), and click **<More>** to see a more detailed list of geographic choices.
 - k. Click **<Save>** once your selections have been made. If your selections are from subclass lists generated from clicking the **<More>** link, you may need to continue to click **<Save>** until you have returned to the top-level class page (**Geographic Area >> World**).
 - l. To add all possible Geographic Areas in a selection list, click the **<Select All>** checkbox at the top of the screen and click **<Save>**.
 - m. The **<Geographic Area>** screen displays the Subjects and Geographic Areas selected.
- 1) Click **<Back to Collection Subject Strengths>** to return to the Collection Subject Strengths screen where you can add Geographic Areas to other subjects as appropriate.

SUBMITTING A QUESTION

From the **Main Menu**, select **<Questions and Answers>**.

- 1) Select **<Submit a Question>**. Please submit only one question, or only closely-related questions, in each form.
- 2) Complete all required fields (designated by an asterisk *), as well as any additional fields.
- 3) Phrase the question in a clear and precise manner to avoid any confusion or ambiguity for the answerer.
- 4) Provide **<End User Information>** if needed.



- 5) Click **<Send>** to submit the question. Please ensure that all the information provided is complete and accurate.

RETRIEVING A QUESTION

From the Main Menu, select **<Questions and Answers>**.

- 1) Select **<View a Question or an Answer>**.
- 2) Click on the down arrow located below the **<Question in Progress>** field and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternatively, enter the question identification number in the **<Question No.>** field and click on **<Retrieve>**.
- 2) Scroll down to the question and answer fields to view the question.
- 3) When you have finished reading the question, click **<Cancel>** to exit the screen.

SUBMITTING AN ANSWER

From the **Main Menu**, select **<Questions and Answers>**.

- 1) Select **<Submit an Answer>**.
- 2) Click on the down arrow located below the **<Question in progress>** field and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternately, enter the question identification number in the **<Question No.>** field and click **<Retrieve>**.
- 3) Scroll down to the **<Question History>** box to read the question. Review all other available information contained in the form.
- 4) To answer, type your response into the **<Answer>** field.
- 5) Select a **<Status>** from the list of available choices.
 - a) If you are providing a complete answer, select **<Complete>**.
 - b) If you are providing a partial answer, select **<Partial Answer>**.
 - c) If you cannot provide an answer for any reason, select **<Reject Redistribute>**.



- d) If you would like further information about the question from the asking institution, indicate this in the **<Answer>** box and select the status **<Send Clarification>**.
- 6) Click **<Submit>** when completed.

RETRIEVING AN ANSWER

From the **Main Menu**, select **<Questions and Answers>**.

- 1) Select **<View a Question or an Answer>**.
- 2) Click on the down arrow located below the **<Question in progress>** field and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternately, enter the question identification number in the **<Question No.>** field and click **<Retrieve>**.
- 3) Scroll down to the **<Answer>** box to retrieve the submitted answer.
- 4) Note whether the status of the answer is set to **<Complete>** or **<Partial Answer>**.
- 5) If you are satisfied with the information supplied, provide the answer to your user.
- 6) If the answer is not as complete as you would like, resubmit the question by changing the status box at the bottom of the screen to **<Re-Submit>** and then click the **<Submit>** button.

CLARIFYING A QUESTION

From the **Main Menu**, select **<Questions and Answers>**.

- 1) Select **<Submit an Answer>**.
- 2) Click on the down arrow located below the **<Question in progress>** field and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternately, enter the question identification number in the **<Question No.>** field and click **<Retrieve>**.
- 3) Scroll down to the **<Answer>** box to read the request for clarification.



- 4) Type your clarification into the **<Answer>** box.
- 5) From the Status/Action field, select **<Clarification>**.
- 6) Click **<Submit>** when completed.

FOLLOWING UP ON AN ANSWER

From the **Main Menu**, select the heading **<Questions and Answers>**.

- 1) Click **<View a Question or an Answer>**.
- 2) Enter the question identification number in the **<Question No.>** field and click **<Retrieve>**.
- 3) Scroll down the screen and click the **<Follow Up>** button.

Note: The **<Follow Up>** button only appears after an answer is submitted with a status **<Complete>**.

- 4) Type your follow up text in the Message box.
- 5) Send your message to all members who participated in the Question/Answer transaction by checking the box next to **<Send to All>**. Send your message to selected members, by checking the box(es) next to the specific member names listed.
- 6) Click **<Submit>**.

CHANGING A DEADLINE

From the **Main Menu**, select **<Questions and Answers>**.

- 1) Select **<Change Deadline>**.
- 2) Click on the down arrow under the **<Question in Progress>** field, and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternately, you can enter the number of the appropriate question in the **<Question No.>** field. Click **<Retrieve>**.
- 3) The current date is displayed in the **<Today's Date>** field under **<Change**



Deadline>. Click on the down arrow under **<Deadline Change>** to select one of the three deadline options (24 hours, 48 hours, or 7 days). The new deadline will automatically appear in the **<New Deadline>** field.

4) Supply information regarding the reasons for the change in the **<Comments>** box. Click on **<Submit>** when you are finished. (If you do not wish to save your changes, click on **<Close>**.)

CANCELLING A QUESTION

From the **Main Menu**, select **<Questions and Answers>**.

- 1) Select **<Cancel a Question>**.
- 2) Click on the down arrow located below the **<Question in progress>** field and select the appropriate question number; the number will automatically be displayed in the **<Question No.>** field. Alternately, enter the question identification number in the **<Question No.>** field and click **<Retrieve>**.
- 3) Scroll down to the **<Comments>** box and enter the reason why the question is being cancelled.
- 4) Click **<Submit>**.
- 5) Click **<OK>** to confirm that you want to cancel the question.

VRC MEMBER REPORTS

From the **Main Menu**, select **<VRC Member Reports>**.

- 1) Select **<Questions submitted to VRC (by month)>**.
 - a) From the , select a month and a year and click **<Send>**.
 - b) By clicking on **<Back>**, VRC will bring you to the menu of the **<VRC Member Reports>**.
- 2) Select **<Questions received in VRC (by month)>**.
 - a) From the , select a month and a year and click **<Send>**.
 - b) By clicking on **<Back>**, VRC will bring you to the menu of the **<VRC Member Reports>**.



- 3) Select **<Member Participation in VRC (by fiscal year)>**.
 - a) From the , select a month and a year and click **<Send>**.
 - b) By clicking on **<Back>**, VRC will bring you to the menu of the **<VRC Member Reports>**.

- 4) Select **<Questions received by Subject Area (by fiscal year)>**.
 - a) From the , select a fiscal year and click **<Send>**.
 - b) By clicking on **<Back>**, VRC will bring you to the menu of the **<VRC Member Reports>**.

- 5) Select **<Overview of Profile Elements (by fiscal year)>**.
 - a) From the , select a fiscal year and click **<Send>**.
 - b) By clicking on **<Back>**, VRC will bring you to the menu of the **<VRC Member Reports>**.

LOGGING OUT

You may logout from any screen in the VRC application at any time.

If you are in the process of entering an answer and have not yet finished, remember to select **<Save Draft>** before logging out. For security reasons, you will be logged off VRC automatically if you have not been active in the system for 12 hours or more. Since there is no automatic save feature in VRC, it is very important to save the work you enter on any VRC screen if you will be away from your workstation for a while.

To Logout, click on the **<Logout>** link located in the top right-hand corner of any VRC screen.