VIRTUAL REFERENCE CANADA

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GUEST MEMBER

INSTRUCTION MANUAL

NATIONAL LIBRARY OF CANADA
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*I*NTRODUCTION

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 as a Guest Member. As a Guest, you are able to submit up to five questions to the VRC service to determine whether VRC suits your institution's needs. The manual highlights only those elements of the VRC service which you will need to use as a Guest Member:

As a Guest Member you are required to complete only a portion of the Member Profile.

- **Providing information about your institution**
  We ask that you provide some basic information about your institution as well as contact information for staff members who will use the service.

- **Submitting a question**
  You must code a question appropriately for it to be routed to an institution best suited to 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.

*G*ETTING 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**
  Leads to a sub-menu where you will input your institution and contact information. (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 and retrieve answers you have received.

- **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.

PROVIDING INFORMATION ABOUT YOUR INSTITUTION

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

The following sections of <**Profile Administration>** should be completed.

- Member Information
- Alternate Names
- Contact Information
- Users

You may return to any section at any time to add, change, or delete data you have input previously.

Step 1   **Member Information**

All information entered should pertain specifically to your participation as a Guest 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 their own name here.

Division	Enter the name of the division in the institution participating in the VRC service, E.G., Reference Division.
Team	Enter the name of the section or team within the Division participating in the VRC 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 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	▪ Active – your institution's status is set to "active" by default. Guest Members should leave the status set to Active.
Home Page URL	If your institution or service is on the Internet, provide the URL.
Fast turn around	Guest Members are not required to complete this element.
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.

<div style="display:inline-block; background:black; color:white; padding:4px 8px;">**Step 2**</div>   **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 Alternate Names for 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**>.

<div style="display:inline-block; background:black; color:white; padding:4px 8px;">**Step 3**</div>   **Contact Information**

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

Notifications regarding questions submitted and answers received 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 both for 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.

From the **Main Menu**, simply select <**Profile Administration**> to review, verify or alter portions of your profile.

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.

Step 4 ### 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.

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	Specify the language of the question you submit. This supports routing to an institution that offers service in that language. To select a language, click on the down arrow to the right of the field. Choose either English or French.
*Question	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.
Permission to Archive	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.
*Class / Subclass / Sub-Subclass	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. 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.
*Education Level	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. To select an educational level, click on the down arrow. Educational levels include: Preschool, Primary/Elementary, Secondary, College/CEGEP/Undergraduate, Masters/Ph.D., Adult, Professional/Specialist.
*Turnaround Time	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.

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	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. 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.
Geographic Area 1,2,3	Code the Geographic Area if the question has a strong geographic component. 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. 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.
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).	The <**User ID Number, Barcode, etc.**> section links the question to the user. (This field is optional.) 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 to specifically identify an end-user.

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.

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**>.

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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*LARIFYING 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 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.

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   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.

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.

CHANGING 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.
Question No.	Input the question identification number into the

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	<**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.

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.

*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**>.

PROVIDING INFORMATION ABOUT YOUR INSTITUTION

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

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.

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      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.
      a) Click <**Profile Administration**> on the application toolbar to return.

4) 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.

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 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.

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.

Revised : 2004-05-10 AEF, NS, BF