

Presentation
Location

20 November 2014

WorldCat Navigator Staff Training

Michael Cosentino

OCLC



OCLC™

The world's libraries.
Connected.

What We're Going to Do Today



- We'll take a quick look at what your patrons see when using Navigator
- We'll talk about the Navigator Workflow, without circulation interoperability
- We'll learn how to process material received for your users
- We're also going to learn how to fill requests made by users from other libraries in your group
- We will use the staff interface called the Navigator Request Engine (NRE)
- We won't cover all the bells and whistles in this session

Main thing to remember for today:



Main Actions a
Lender does:

Ship

Check In

Main Actions a
Borrower does:

Receive

Return

The Navigator Patron Interface



- Users at your library will search your consortium's Navigator group catalog set up by OCLC:
<http://texasgroup.worldcat.org/>
- Both interfaces- Navigator group catalog and WorldCat Local- closely resemble Worldcat.org.
- Demo Interface for trainer:
<http://texasgroup.owcap01dxdu.dev.oclc.org/>

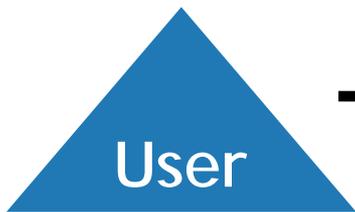


- In a nutshell - Navigator makes the libraries in your group LOOK like one big library with branches
 - Users search one catalog for the whole group
 - Users request material anywhere within the group
 - Circulation staff fetch material
 - Material is sent to the right library
- We call this consortial borrowing

The Navigator Workflow



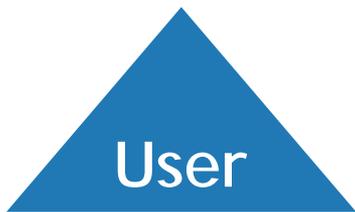
Users search Navigator



The Navigator Workflow

Once an item is requested, Navigator chooses which libraries to query based on availability and group defined protocols

Borrowing
Library



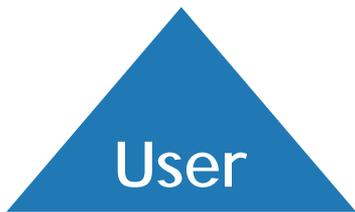
Lending
Library

The Navigator Workflow



The request is placed in a Navigator queue for the lending library to confirm availability and shipment

Borrowing
Library



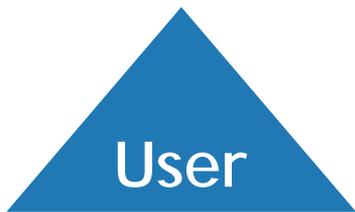
Lending
Library

The Navigator Workflow



Lending library staff print pick slips from Navigator and search the stacks

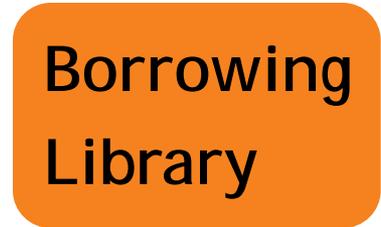
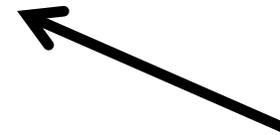
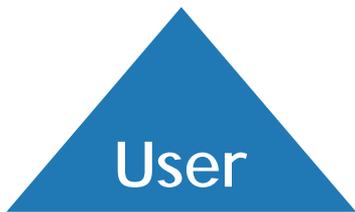
Borrowing Library



Lending Library

The Navigator Workflow

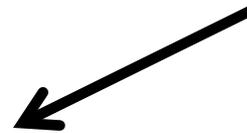
For requests found, staff ship the item and confirm in Navigator. Staff check the item out to the borrowing library.



The Navigator Workflow



When the item is received at the borrowing library, staff confirm receipt in Navigator

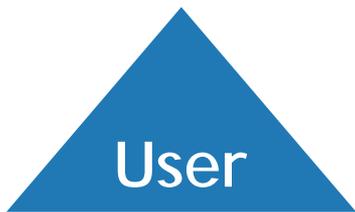


The Navigator Workflow



Staff can create a temporary bibliographic and item record in the borrowing library's circulation system

Borrowing Library

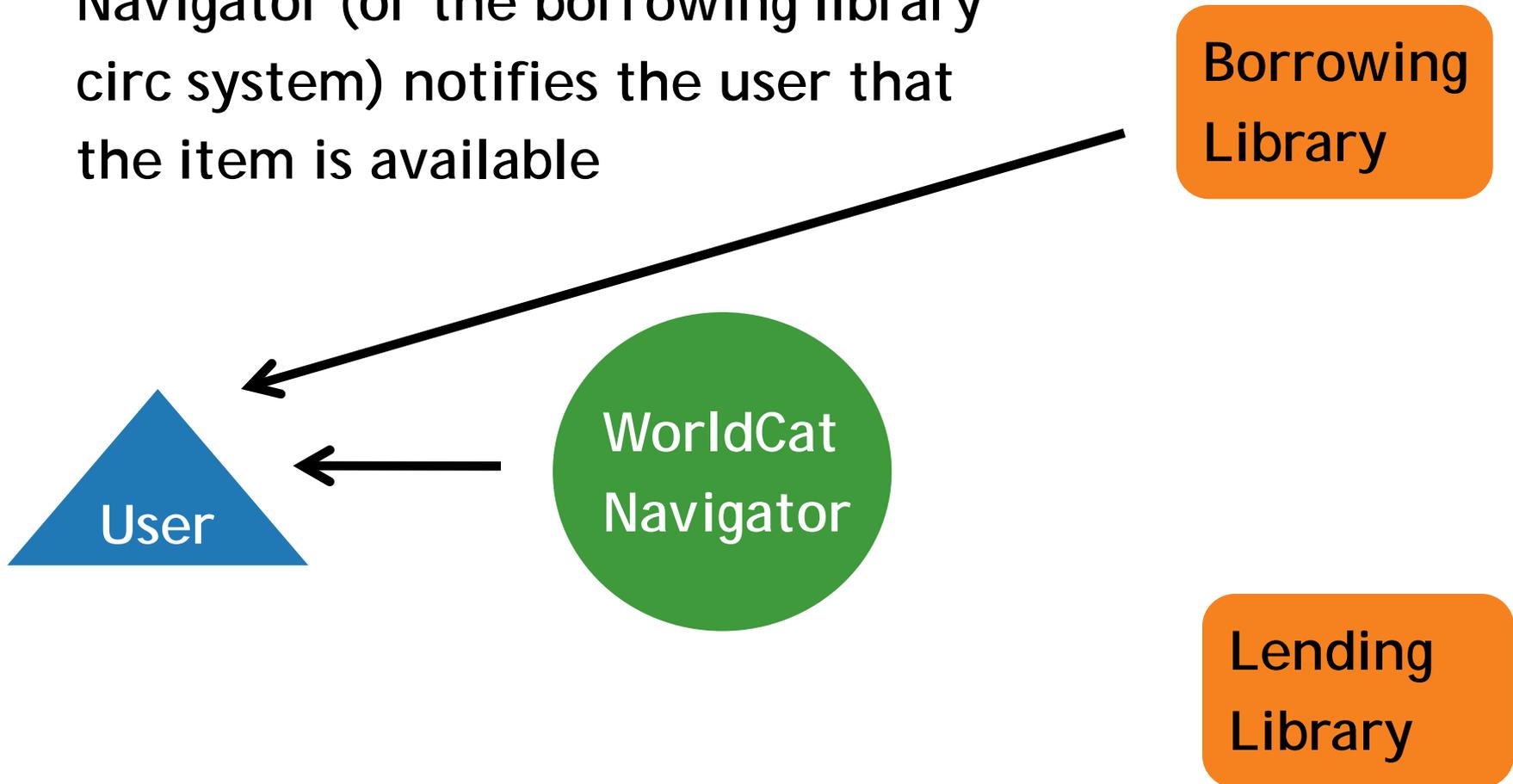


WorldCat Navigator

Lending Library

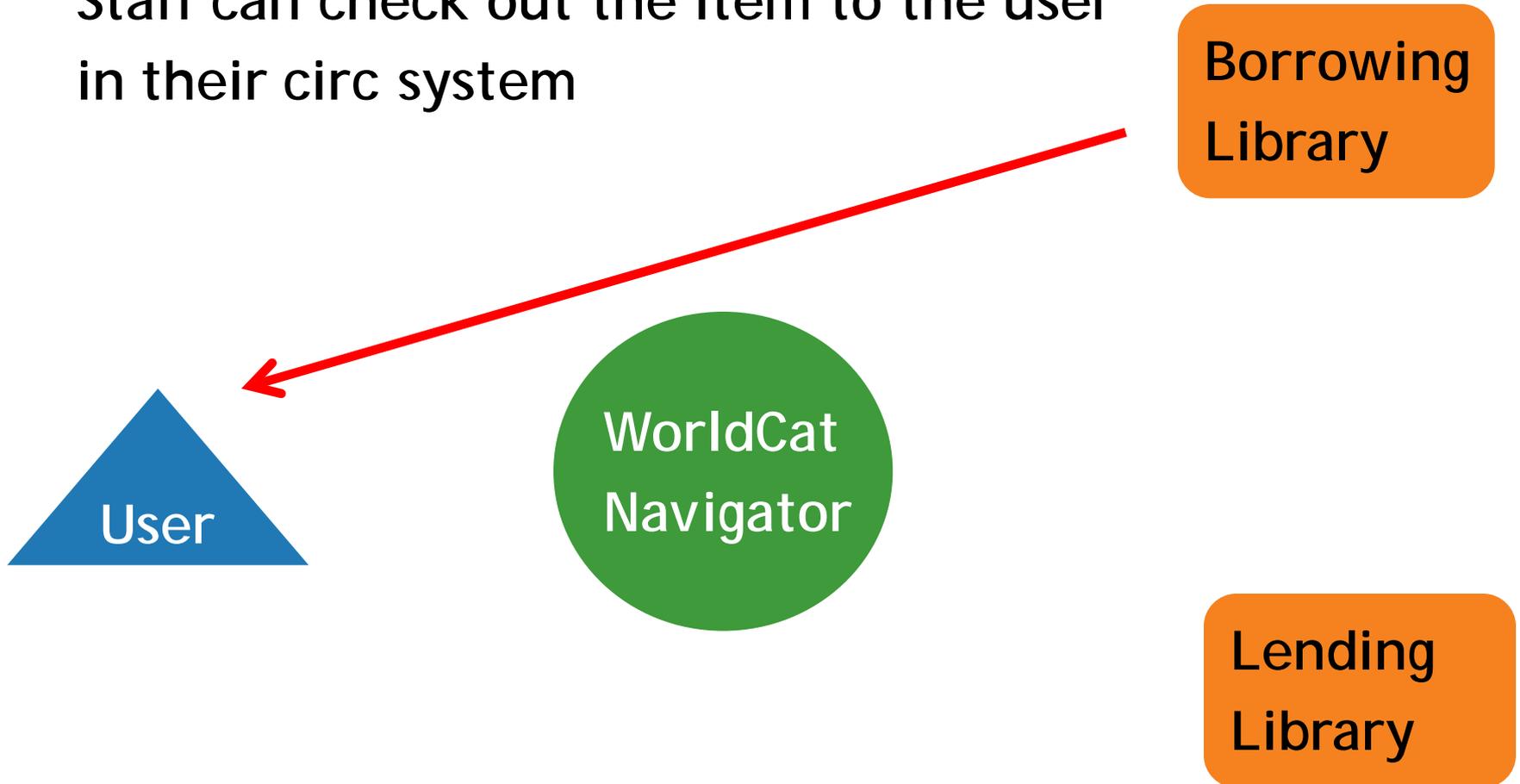
The Navigator Workflow

Navigator (or the borrowing library circ system) notifies the user that the item is available



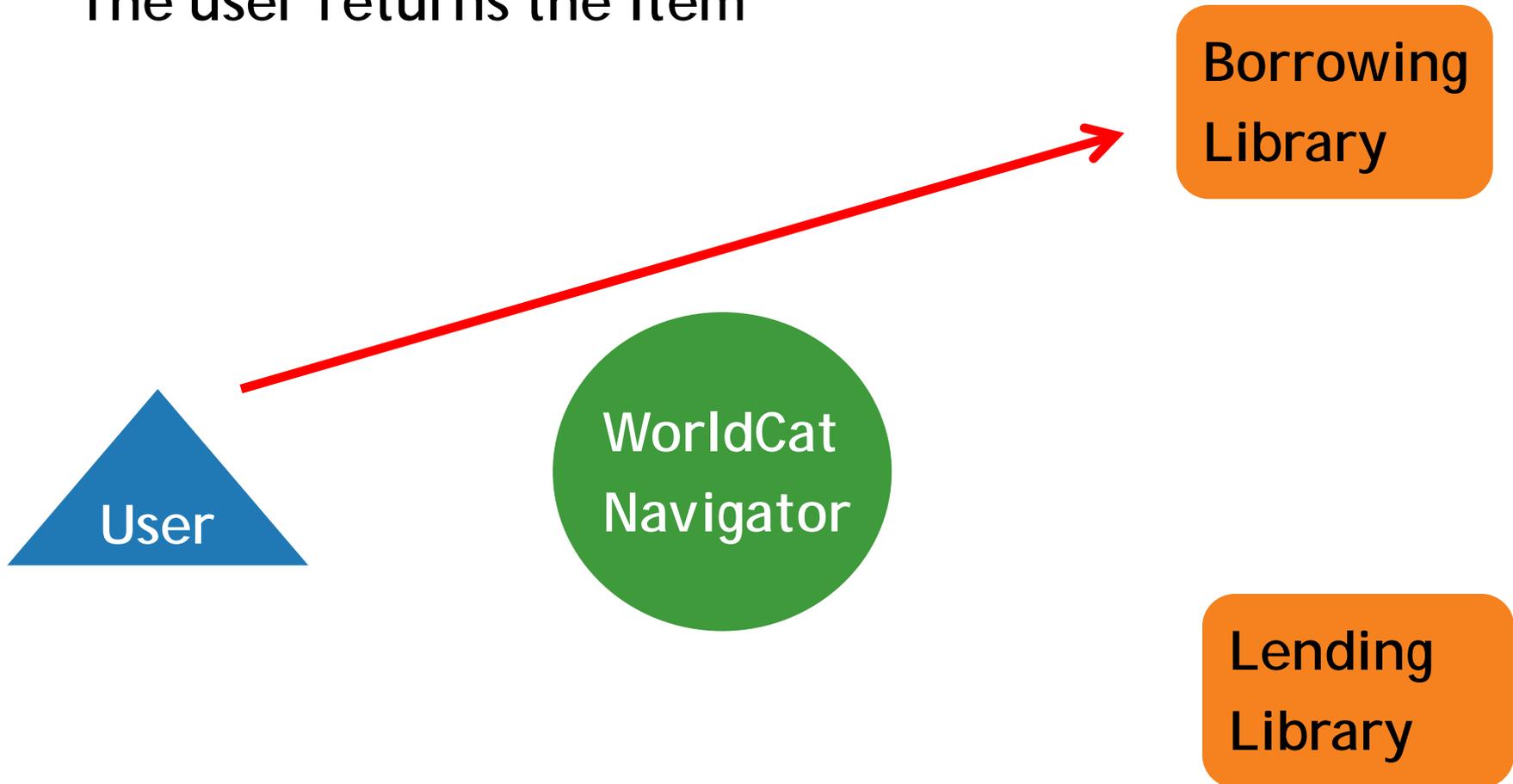
The Navigator Workflow

Staff can check out the item to the user
in their circ system



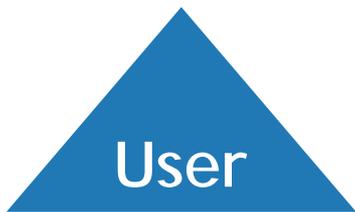
The Navigator Workflow

The user returns the item



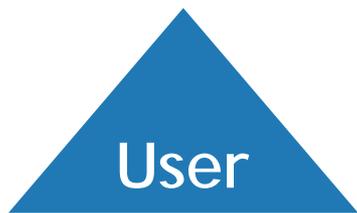
The Navigator Workflow

Staff return the item, confirm in Navigator, and can check the item back in in their circ system



The Navigator Workflow

Staff check the item back in and confirm the return in Navigator which completes the request



How Does Navigator Handle Exceptions



- If a lending library cannot supply an item Navigator will try other libraries based on availability and protocol
- If an item cannot be supplied by any member, Navigator can automatically pass the request to WorldCat Resource Sharing or ILLiad
- Unfilled requests can also be sent back to the user or to the borrowing library staff
- Requests are available to both the borrowing and the lending library so that other exceptions such as a renewal request or a lost item can be handled

How Do I Logon?



NRE

[Search](#)

[Login](#)

[Help](#)

[Texas Resource
Sharing Project](#)

Login

User ID	<input type="text"/>
Password	<input type="password"/>
	<input type="button" value="Login"/> Reset

Watch this space for messages from the Texas Resource Sharing Project.

It is recommended to change the password on your NRE staff login. To do this:

1. Log into NRE
2. Click User on the left menu and look up your staff User ID.
3. Click on Edit.
4. Enter your new password, confirm it, check the "Update Password" box and save the record.

OCLC is now holding weekly Q&A sessions for any and all libraries actively implementing or already live with the new Texas ILL service, WorldCat Navigator.

This session is offered every Thursday morning at 10:00 AM Central Daylight Time. To attend this session, please go to the following address when you are ready to [join the session](#).

The Navigator Staff Interface or NRE



NRE

[Standard](#) | [Advanced](#) | [Results](#) | [Bulk Action](#) | [Create](#) | [Batch Update](#) | [Saved Searches](#) | [Work Queue](#)

[Search](#)

[Requests](#)

[Work Queue](#)

[User](#)

[Locations](#)

[Reports](#)

[Batch Reruns](#)

[Report a Problem](#)

[Logout](#)

[Help](#)

[Texas Resource
Sharing Project](#)

User ID
ZZZ01

Work Queue

 [Edit Work Queue](#)

Borrower	
Category	Count
Idle / Check Manual	1
Idle / Auth Manual	0
Pending	36
Pending > 4 days	5
Pending > 2 weeks	3
Terminated	0
End of lender string	252
Conditional	0
Cancel Pending	19
Messages	1
Staff Review	0
Shipped	202
Shipped > 1 week	194
Shipped > 2 weeks	194
Received	1

Lender	
Category	Count
New Requests	0
New Requests Expiring Today	0
Will Supply	0
Will Supply > 4 days	0
Will Supply > 2 weeks	0
Conditional	0
Cancel Requested	0
Messages	0
Staff Review	0
Shipped	614
Returned	249
Renewal Requested	13
Overdue Today	388
Overdue > 4 weeks	1
Reports	

How Is NRE Organized?

Left-hand Menu



Search

- Search for material in WorldCat

Requests

- Standard search for requests

Work Queue

- Look at the Work Queue

User

- Search for and edit users

Locations

- Search for and edit library locations

Reports

- Print reports

Batch Reruns

- A shortcut to Printing Reports

Report a Problem

- Send issues with Requests directly to OCLC

Logout

- Logoff

Help

- Help

OCLC Policy
Directory

- Link to site where you can communicate your library's loan policies to other group members

Texas Resource
Sharing Project

- Link to Navigator project site maintained by TSLAC

Training Videos

- Short videos to remind you how to process items

How Is NRE Organized?

Links From the Work Queue Page



[Standard](#) | [Advanced](#) | [Results](#) | [Bulk Action](#) | [Create](#) | [Batch Update](#) | [Saved Searches](#) | [Work Queue](#) | [Work Queue Edit](#)

- **Standard** Standard search for requests
- **Advanced** Advanced search for requests
- **Results** Results of most recent search for requests
- **Bulk Action** Same action on many requests (later)
- **Create** Create a manual request (later)
- **Batch Update** Quickly update requests
- **Saved Searches** Stored searches for requests
- **Work Queue** The work queue
- **Work Queue Edit** Change the layout of the work queue

Work Queue- Left hand menu & links

NRE

[Standard](#) | [Advanced](#) | [Results](#) | [Bulk Action](#) | [Create](#) | [Batch Update](#) | [Saved Searches](#) | [Work Queue](#)

- Search
- Requests
- Work Queue
- User
- Locations
- Reports
- Batch Reruns
- Report a Problem
- Logout
- Help
- Texas Resource Sharing Project

User ID
ZZZ01

Work Queue

[Edit Work Queue](#)

Borrower	
Category	Count
Idle / Check Manual	1
Idle / Auth Manual	0
Pending	36
Pending > 4 days	5
Pending > 2 weeks	3
Terminated	0
End of lender string	252
Conditional	0
Cancel Pending	19
Messages	1
Staff Review	0
Shipped	202
Shipped > 1 week	194
Shipped > 2 weeks	194
Received	1

Lender	
Category	Count
New Requests	0
New Requests Expiring Today	0
Will Supply	0
Will Supply > 4 days	0
Will Supply > 2 weeks	0
Conditional	0
Cancel Requested	0
Messages	0
Staff Review	0
Shipped	614
Returned	249
Renewal Requested	13
Overdue Today	388
Overdue > 4 weeks	1
Reports	

The Work Queue



Borrower	
Category	Count
Idle / Check Manual	1
Pending	0
Pending > 4 days	0
Pending > 2 weeks	0
Terminated	0
End of lender string	0
Conditional	0
Cancel Pending	2

Lender	
Category	Count
New Requests	5
New Requests Expiring Today	0
Will Supply	0
Conditional	0
Cancel Requested	0

Terminated	0
End of lender string	0
Conditional	0
Cancel Pending	<u>2</u>
Messages	0
Staff Review	0
Shipped	<u>3</u>
Shipped > 1 week	<u>3</u>
Shipped > 2 weeks	<u>3</u>
Received	<u>1</u>
Renew Pending	<u>1</u>

Conditional	0
Cancel Requested	0
Messages	0
Staff Review	0
Shipped	<u>3</u>
Returned	0
Overdue Today	<u>3</u>
Overdue > 4 weeks	0

Shipped	3
Shipped > 1 week	3
Shipped > 2 weeks	3
Received	1
Renew Pending	1
Overdue	0
Recalled	2
Returned	1
Reports	
Received List	0
Returned List	0

Shipped	3
Returned	0
Overdue Today	3
Overdue > 4 weeks	0
Reports	
Pick List	0
Shipping List	0

What do you really do when you get to work?



- Not necessarily in this order
- Have a cup of coffee
- Open the mail
 - Other library's books that your users have ordered
 - Your books returned from other libraries
- Send the books your users are done with back to the lender
- Check Navigator for new requests from other libraries and fill them
- Deal with the exceptions and problems

Other library's books that your users have ordered



- Check the condition of the book
- Check the paperwork that came with the book
 - Get the due date
 - Get any special conditions
- Tell Navigator you received the book
 - Navigator can send an email to your user
 - Navigator can print a bookmark or book strap if you want
- Create temporary bib and item records in your circ system
 - Optional
- Put the book on the hold shelf

Your books returned from other libraries



- Check the condition of the book
- Tell Navigator you are checking the book back in
- In your circ system check the book back in
- Toss the paperwork
- Shelve the book

Send the books your users are done with back to the lender



- Check the condition of the book
- Make sure the lender's paperwork is still there
- If you created a record in your circ system, check the book back in and delete the temporary bib and item records
- Tell Navigator you are returning the book
 - Navigator can print a return slip if the lender's paperwork is gone
- Send the book back to the lender

Check Navigator for new requests from other libraries and fill them



- Print pick slip from Navigator
- Check the shelves and retrieve the book
- Check the book out to ILL or the borrowing library
- Tell Navigator you shipped the book
 - Navigator can print shipping paperwork
 - *Always tell Navigator before you actually ship*
- Ship the book

Checking Navigator for New Requests

[Standard](#) | [Advanced](#) | [Results](#) | [Bulk Action](#) | [Create](#) | [Batch Update](#) | [Saved Searches](#) | [Work Queue](#)

Work Queue

Borrower	
Category	Count
Idle / Check Manual	1
Idle / Auth Manual	0
Pending	6
Pending > 4 days	5
Pending > 2 weeks	3
Terminated	0
End of lender string	251
Conditional	0
Cancel Pending	17
Messages	0
Staff Review	0
Shipped	200
Shipped > 1 week	198
Shipped > 2 weeks	179
Received	3
Renew Pending	5

Lender	
Category	Count
New Requests	1
New Requests Expiring Today	0
Will Supply	0
Will Supply > 4 days	0
Will Supply > 2 weeks	0
Conditional	0
Cancel Requested	0
Messages	0
Staff Review	0
Shipped	580
Returned	237
Renewal Requested	11
Overdue Today	380
Overdue > 4 weeks	0
Reports	
Pick List	1

New Requests will appear here, as well as in the Pick List status below.

Start from the Pick List

Reports	
Pick List	1

Pick Slips



CALL NO: Your call number will be here

REQUEST NO: 2178



TITLE: Mudlumps at the mouth of South Pass, Mississippi River

AUTHOR: Morgan, James P. (James Plummer), 1919-; Coleman, James M. joint author.; Gaglia

PUBLISHER DATE: 1963.

VOLUME:

DESCRIPTION:

FORMAT:

BORROWING Library District 103

LIBRARY:

PATRON NOTES:

Click on items in New Requests status

Lender	
Category	Count
New Requests	<u>1</u>

From Brief Display, select Shipped in Action Menu, click Action

115747 / 104276 ** Chico Public Library / Lone Star Library *TESTING*

Al Capone does my shirts

Choldenko, Gennifer 1957- | ISBN: 0399238611;9780399238611

Status: **In Process:** *Authorisation:* **Unread** *Last Action:* **REQUEST-Indication:** 14 Nov 2011

Shipped

Action



[Details](#)

Shipping



Request Details

Our Number 119252
Status Shipped
Title Complete copyright
Subtitle an everyday guide for librarians
Author Russell, Carrie;Buttler, Dwayne K;American Library Association. Office for

Public Note

Private Note

On the Shipping Action screen, find the Item Barcode Lender field, and input the barcode from the item you are about to lend

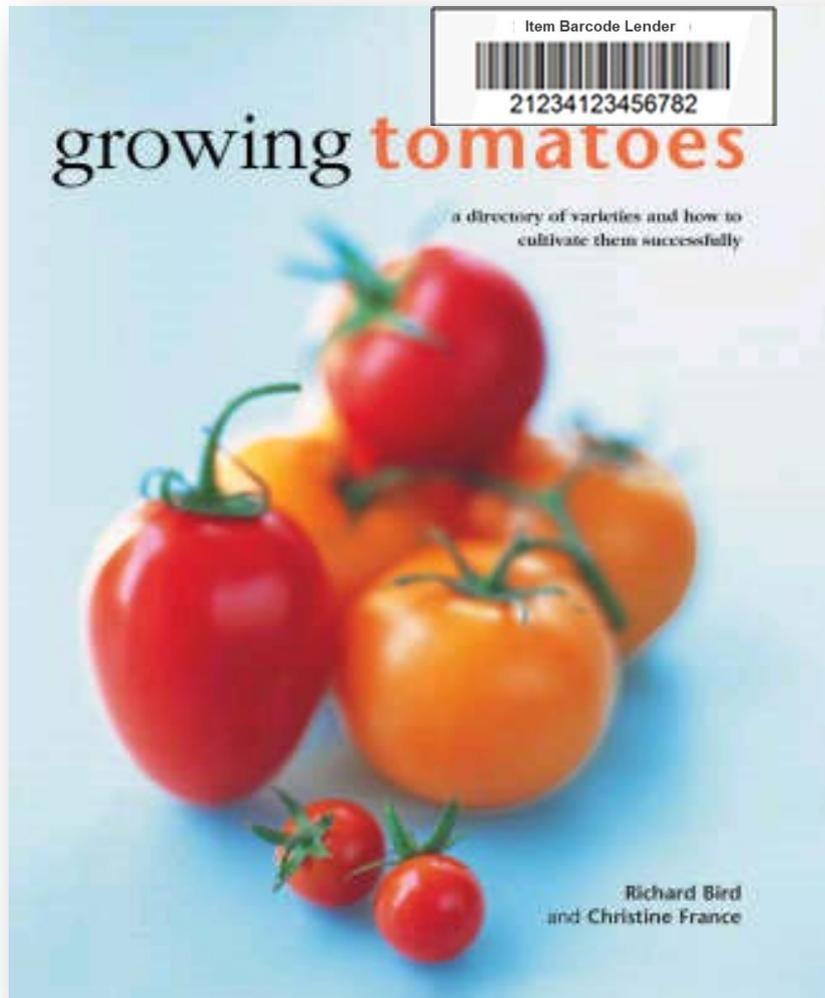
Type

Service Type Loan

Item barcode - Lender is now a required field. Please enter the item barcode.

Item Barcode - Lender

Item Barcode-Lender



Item Barcode Lender is simply the barcode your library puts on its books

Service Details

Requested Service Loan
Type

Service Type

Item barcode - Lender is now a required field. Please enter the item barcode.

Item Barcode - Lender

Number of Items

Ship Date  (e.g. 10 Jun 2009)

None Short Long

Due Date  (e.g. 10 Jun 2009)

Media Type

Delivery Method

E Delivery Params

Conditions

Click Ship to update the status of the item

Copyright Info



Ship

[Reset](#)

Action Successful

Your action has been successful.

Use the [Requests](#) option to search for more requests, or the [Results](#) option to return to the results of the last search.

When you see the 'Action Successful' message, you may click on the Results link to go back to the Brief Display and process remaining requests

Shipping

Borrower	
Category	Count
Idle / Check Manual	1
Idle / Auth Manual	0
Pending	6
Pending > 4 days	5
Pending > 2 weeks	3
Terminated	0
End of lender string	251
Conditional	0
Cancel Pending	17
Messages	0
Staff Review	0
Shipped	200
Shipped > 1 week	198
Shipped > 2 weeks	179
Received	3
Renew Pending	5
Overdue	0
Recalled	0
Returned	87

Lender	
Category	Count
New Requests	0
New Requests Expiring Today	0
Will Supply	0
Will Supply > 4 days	0
Will Supply > 2 weeks	0
Conditional	0
Cancel Requested	0
Messages	0
Staff Review	0
Shipped	587
Returned	237
Renewal Requested	11
Overdue Today	380
Overdue > 4 weeks	0
Reports	
Pick List	0
Shipping List	1
Shipping label	1
Ship Mail Label	1

Items that were in New Requests will move down to the Shipped status

They will also populate the Shipping List, Label, and Mailing Label reports.

Shipping - Shipping List



**** Please Do Not Remove Band From Item ****

BORROWER REQUEST NO: 1398



LENDER REQUEST NO: 1424



SHIPPED BARCODE

TEMPORARY BARCODE:

PATRON NAME:

Shipping



PATRON NAME:

**PLEASE RETURN THIS ITEM TO THE LIBRARY
WHERE YOU RECEIVED IT**

**PATRON DUE
DATE:**

TITLE: Let me tell you a story : a lifetime in the
game

DATE SHIPPED: 30-JUL-2009

INSTITUTIONAL DUE DATE: 20-AUG-2009

DUE DATE:

SHIP TO: Train14

ADDRESS: 4 1Train14
Train14, T14
11014

PHONE: (999) 999-1114

SHIPPED FROM: Train13

ADDRESS: 3 1Train13
Train13, T13
11013

PHONE: (999) 999-0013

PICKUP LOCATION: Train 1-04

SPECIAL INSTRUCTIONS:

Shipping Demonstration

<http://train.vdxhost.com/nre>

Other library's books that your users have ordered



- Check the condition of the book
- Check the paperwork that came with the book
 - Get the due date
 - Get any special conditions
- Tell Navigator you received the book
 - Navigator can send an email to your user
 - Navigator can print a bookmark or book strap if you want
- Create temporary bib and item records in your circ system
 - Optional
- Put the book on the hold shelf

Receiving

Work Queue

Items that were in Pending will be in Shipped, waiting for you to Receive them

Borrower		Lender	
Category	Count	Category	Count
Idle / Check Manual	1	New Requests	0
Idle / Auth Manual	0	New Requests Expiring Today	0
Pending	6	Will Supply	0
Pending > 4 days	5	Will Supply > 4 days	0
Pending > 2 weeks	3	Will Supply > 2 weeks	0
Terminated	0	Conditional	0
End of lender string	251	Cancel Requested	0
Conditional	0	Messages	0
Cancel Pending	17	Staff Review	0
Messages	0	Shipped	587
Staff Review	0	Returned	237
Shipped	200	Renewal Requested	11
Shipped > 1 week	198	Overdue Today	380
Shipped > 2 weeks	179	Overdue > 4 weeks	0
Received	3	Reports	
Renew Pending	5	Pick List	0

Click on items in Shipped status, from the Borrower column in your Work Queue

Shipped	<u>200</u>
---------	------------

In the Brief Display, select the Received Action, and click the Action button

112466 / 112469 ** Lone Star Library *TESTING* / Stonewall County Library

Complete copyright - an everyday guide for librarians

Russell, Carrie;Buttler, Dwayne K;American Library Association. Office for Information Technology Policy. | ISBN: 0838935435;97808

Status: **Shipped:** Authorisation: **Unread** Last Action: **Shipped-Indication** 09 Nov 2011 Lender string: 1 of 1

Received

Action



Details

Receiving



Request

Action: Received

[Receive](#) [Reset](#)

Receiving from Stonewall County Library

Our Number 112466

Status Shipped

Find the Item Barcode- Borrower field, and input either an extra barcode for your circ system or the barcode from the lender's item

Number of Items

Received Date  (e.g. 10 Jun 2009)

Due Date 05 Jan 2012

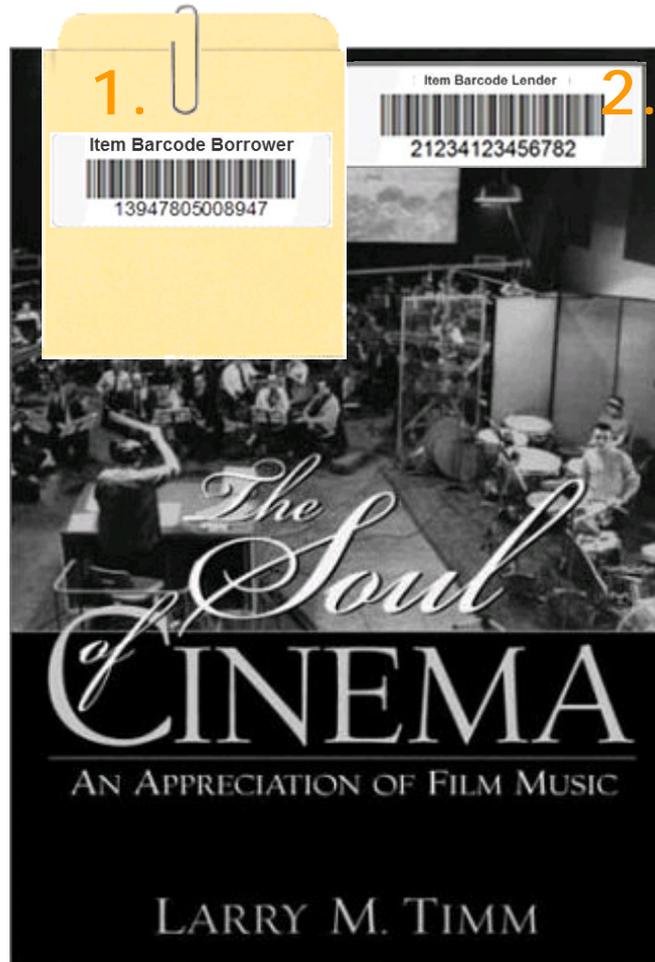
Local Due Date  (e.g. 10 Jun 2009)

Item barcode - Borrower is now a required field. Please enter the item barcode.

Item Barcode - Borrower

Item Barcode - Lender 794561234

Item Barcode Borrower



Item Barcode Borrower can come from one of two places:

1. The barcode you use to create a temporary record in your circ system
2. Or, just use the lending library's barcode (Item Barcode Lender)

Action Successful

Your action has been successful.

Use the [Requests](#) option to search for more requests, or the [Results](#) option to return to the results of the last search.

[Go to next request in the result set](#)

When you see the 'Action Successful' message, you may click on the Results link to go back to the Brief Display and process remaining requests

Receiving

Items that were in Shipped will move down to the Received status.

While Items are with your patrons, they will be in the Received status.

The Received List and Received Label reports will also populate

Cancel Pending	19
Messages	1
Staff Review	0
Shipped	196
Shipped > 1 week	194
Shipped > 2 weeks	194
Received	7
Renew Pending	6
Overdue	0
Recalled	0
Returned	100
Reports	
Received List	6
Received Label	6
Returned List	18
Return Mail Label	3

Staff Review	0
Shipped	614
Returned	249
Renewal Requested	13
Overdue Today	388
Overdue > 4 weeks	1
Reports	
Pick List	0
Shipping List	0
Shipping label	0
Ship Mail Label	0

Receiving



Library District 104

Received Slip

**** Please Do Not Remove Band From Item ****

DATE DUE: 11-MAY-2010

Patron Name: Staff Train 1-04
Department:
Email:

User ID: TRAIN14
Status:

PICKUP LOCATION: Library District 104

REQUEST NO: 2175
Supplier: Library District 103

TITLE: Mudlumps at the mouth of South Pass, Mississippi River: sedimentology, paleontology, structure, origin, and relation to deltaic processes

AUTHOR: Morgan, James P. (James Plummer), 1919-; Coleman, James M. joint author.; Gagliano, Sherwood M. joint author.
Publisher Info: Baton Rouge, Louisiana State University Press, 1963.

VOLUME:

Volume/Edition:

Date:

Pages:

Article Title:

Article Author:

ISBN:

ISSN:

Number of Units:

Shipped Conditions:

Companion document

No reproduction

Library use only

Supervision

PATRON NOTES:

Receiving Demonstration

<http://train.vdxhost.com/nre>

Send the books your users are done with back to the lender



- Check the condition of the book
- Make sure the lender's paperwork is still there
- If you created a record in your circ system, check the book back in and delete the temporary bib and item records
- Tell Navigator you are returning the book
 - Navigator can print a return slip if the lender's paperwork is gone
- Send the book back to the lender

Returning



Work Queue

Borrower	
Category	Count
Idle / Check Manual	1
Idle / Auth Manual	0
Pending	6
Pending > 4 days	5
Pending > 2 weeks	3
Terminated	0
End of lender string	251
Conditional	0
Cancel Pending	17
Messages	0
Staff Review	0
Shipped	199
Shipped > 1 week	198
Shipped > 2 weeks	179
Received	4
Renew Pending	5

Lender	
Category	Count
New Requests	0
New Requests Expiring Today	0
Will Supply	0
Will Supply > 4 days	0
Will Supply > 2 weeks	0
Conditional	0
Cancel Requested	0
Messages	0
Staff Review	0
Shipped	587
Returned	237
Renewal Requested	11
Overdue Today	380
Overdue > 4 weeks	0
Reports	
Pick List	0

Find items you are ready to return in the Received status

Returning - individual items

You may either return items Individually.....

[Save Search](#)

Number of Results: 50+

Result pages: 1 [2](#) [3](#) [4](#) [5](#) >

Bulk Action: [Select all](#) [Deselect all](#) [Bulk Action](#)

Our Number / Their Number ** Borrower / Lender ** Item Barcode

118249 / 118254 ** Lone Star Library *TESTING* / Anson Public Library

Paper towns

Green, John 1977- | ISBN: 9780525478188;0525478183

Status: **Shipped:** Authorisation: **Unread** Last Action: **Shipped-Indication:16 Nov 2011** Lender string: 1 of 1

Received

Action

[Details](#)

[Mark as Read](#)

[Print](#)

118248 / 118255 ** Lone Star Library *TESTING* / Anson Public Library

Lucky breaks

Patron, Susan 1948-;Phelan, Matt ill. | ISBN: 9781416939986;1416939989

Status: **Shipped:** Authorisation: **Unread** Last Action: **Shipped-Indication:16 Nov 2011** Lender string: 1 of 1

Received

Action

[Details](#)

[Mark as Read](#)

[Print](#)

Returning - individual items



Action: Returned

[Return](#) [Reset](#)

Our Number 118261

Status Received

Title Paper towns

Author Green, John 1977-

Return Date  (e.g. 10 Jun 2009)

Returned Via

Insured Amount

Insured Currency

Item Barcode - Borrower 640196

Item Barcode - Lender 697853

Public Note

Private Note

Returning



Or you may Return multiple items at once, using Bulk Action

[Save Search](#)

Number of Results: 50+

Result pages: 1 [2](#) [3](#) [4](#) [5](#) >

Bulk Action: [Select all](#) [Deselect all](#) [Bulk Action](#)

Our Number / Their Number ** Borrower / Lender ** Item Barcode

- 18249 / 118254 ** Lone Star Library *TESTING* / Anson Public Library
Paper towns
Green, John 1977- | ISBN: 9780525478188;0525478183
Status: Shipped: Authorisation: Unread Last Action: Shipped-Indication: 16 Nov 2011 Lender string: 1 of 1
Received [Action](#) [Details](#) [Mark as Read](#) [Print](#)
- 18248 / 118255 ** Lone Star Library *TESTING* / Anson Public Library
Lucky breaks
Patron, Susan 1948-;Phelan, Matt ill. | ISBN: 9781416939986;1416939989
Status: Shipped: Authorisation: Unread Last Action: Shipped-Indication: 16 Nov 2011 Lender string: 1 of 1
Received [Action](#) [Details](#) [Mark as Read](#) [Print](#)

Returning- multiple items, using Bulk Action



Enter Request IDs, separated by blanks or commas

Request IDs

Action

Authorization Status

[Reset Form](#)

Authorization status or process status for all the requests

Returning- multiple items, using Bulk Action



Request

Action: Returned

[Return](#) [Reset](#)

Our Numbers 118260, 118261

Return Date  (e.g. 10 Jun 2009)

Returned Via

Insured Amount

Insured Currency

Public Note

Private Note

[Return](#) [Reset](#)

Returning

Items that are returned will move from Received Status to Returned Status

They will also populate the Returned List & Returned Mail Label paperwork

Cancel Pending	19
Messages	1
Staff Review	0
Shipped	196
Shipped > 1 week	194
Shipped > 2 weeks	194

Received	7
Renew Pending	6
Overdue	0
Recalled	0
Returned	100

Reports	
Received List	6
Received Label	6
Returned List	18
Return Mail Label	3

Staff Review	0
Shipped	614
Returned	249
Renewal Requested	13
Overdue Today	388
Overdue > 4 weeks	1

Reports	
Pick List	0
Shipping List	0
Shipping label	0
Ship Mail Label	0

Returning



Return Slip

TO: 4 1Train14
Train14, T14
11014

PHONE: (999) 999-0014

Method:

Insured:

Supplier: Train14 (Train 1-04)

From: 3 1Train13
Train13, T13
11013

PHONE: (999) 999-0013

Request Info: Train 1-03 1390
Number of Units:

Doc Received:

TITLE: Glimmerings of truth : being a collection of poems / by William
AUTHOR: Cumpston, William Henry.
Article Title:
Article Author:

PATRON NOTES:

Returned Demonstration

<http://train.vdxhost.com/nre>

Your books returned from other libraries



- Check the condition of the book
- Tell Navigator you are checking the book back in
- In your circ system check the book back in
- Toss the paperwork
- Shelve the book

Check In



Category	Count
Idle / Check Manual	1
Idle / Auth Manual	0
Pending	37
Pending > 4 days	5
Pending > 2 weeks	3
Terminated	0
End of lender string	252
Conditional	0
Cancel Pending	19
Messages	1
Staff Review	0
Shipped	196
Shipped > 1 week	194
Shipped > 2 weeks	194
Received	7
Renew Pending	6

Category	Count
New Requests	1
New Requests Expiring Today	0
Will Supply	0
Will Supply > 4 days	0
Will Supply > 2 weeks	0
Conditional	0
Cancel Requested	0
Messages	0
Staff Review	0
Shipped	614
Returned	249
Renewal Requested	13
Overdue Today	388
Overdue > 4 weeks	1
Reports	
Pick List	1

Items that you have loaned and have been sent back to you, will be in the Returned Status on the Lender side of your Work Queue

Check In - individual items



52507 / 52504 ** Sterling County Public Library / Lone Star Library *TESTING* ** 125478963

Al Capone does my shirts

Choldenko, Gennifer, 1957- | ISBN: 0399238611 9780399238611

Status: Shipped: *Authorisation:* Processed *Last Action:* Shipped:09 Aug 2011

Checked In ▾ Action

 [Details](#)

 Mark as Read

Check In - individual items



Action: Checked In

[Check In](#) [Reset](#)

Our Number 52507

Status Shipped

Title Al Capone does my shirts

Author Choldenko, Gennifer, 1957-

Check In Date  (e.g. 10 Jun 2009)

Item Barcode - Lender 125478963

Public Note

Private Note

[Check In](#) [Reset](#)

Check In - multiple items, using Bulk Action



Bulk Action: [Select all](#) [Deselect all](#) [Bulk Action](#)

Our Number / Their Number ** Borrower / Lender ** Item Barcode

35142 / 35141 ** Austin Public / Lone Star Library *TESTING*

The law and Harry Potter

Thomas, Jeffrey E., 1959-; Snyder, Franklin G. | ISBN: 9781594606458 (alk. paper) 1594606455 (alk. paper)

Status: Shipped: Authorisation: Processed Last Action: Shipped:30 Jun 2011

Checked In

Action



Details



Mark as Read

38116 / 38115 ** Buda Public Library / Lone Star Library *TESTING*

Harry Potter and the prisoner of Azkaban

Rowling, J. K. | ISBN: 0439136350 (hc) 9780439136358 (hc) 0439136369 (pb) 9780439136365 (pb)

Status: Shipped: Authorisation: Processed Last Action: Shipped:08 Jul 2011

Checked In

Action



Details



Mark as Read

Check In - multiple items, using Bulk Action



Enter Request IDs, separated by blanks or commas

Request IDs

Action

Authorisation Status

[Reset Form](#)

- Add Private Note
- Answer Conditional
- Answer Hold
- Answer Nonsupply
- Answer Will Supply
- Cancel Reply-No
- Cancel Reply-Yes
- Checked In**
- Complete
- Conditional Reply-No
- Conditional Reply-Yes
- Cost Adjustment
- Damaged
- Lost
- Overdue
- Recall
- Refer to Staff
- Renew

Authorisation status or process status for all the requests

Check In - multiple items, using Bulk Action



Request

Action: Checked In

Check In [Reset](#)

Our Numbers 35142, 38116

Check In Date  (e.g. 10 Jun 2009)

Public Note

Private Note

Check In [Reset](#)

Check In Demonstration

<http://texas.vdxhost.com/nre>

Thank you!



This is the end of Part 1 of the Navigator training.

Please make sure you have registered for a Part 2 / Exercise session.

<http://tinyurl.com/NavigatorPart2-July25th>

<http://tinyurl.com/NavigatorPart2-Aug8th>

<http://tinyurl.com/NavigatorPart2-Aug22nd>

There will also be a Q&A webinar Thursday mornings at 10am Central. Be on the lookout for an invitation to it.

WorldCat Navigator Staff Training Part 2

Basic Processing Exercises

Searching for Requests

Handling Exceptions and Problems



OCLC™

The world's libraries.
Connected.

WorldCat Navigator Staff Training: Part 2 Exercise Session



Welcome to the Exercise Session for WorldCat Navigator!

Please make sure you have the following documents ready:

- WorldCat Navigator Processing Exercise instructions
- WorldCat Navigator Searching Exercise instructions

These documents were emailed to you prior to the session today. Either have these documents open on your computer or printed out.

If you do not have these documents, contact the Host or Presenter via chat. Check your email's Spam folder as well

Basic Processing Exercises

Exercise 1: Print Pick List, Ship items



1. Print a *Pick List* from Lender side of Work Queue; save it to your computer Desktop.
2. Click on New Requests/Will Supply status, *Ship* items with Item Barcode Lender
3. When finished, go to Participants Panel in WebEx, & give a green check mark 
4. If you have problems, go to Participants Panel in WebEx, & give a red X,  or raise your hand  and we'll un-mute your phone

Exercise 2: Using Shipping slip or Label, Receive items

1. Click on simulation link from chat window; switch over to your browser
2. Click on Shipped status, *Receive* items with Item Barcode Borrower
3. When finished, go to Participants Panel in WebEx, & give a green check mark 
4. If you have problems, go to Participants Panel in WebEx, & give a red X ,  or raise your hand  and we'll un-mute your phone

Exercise 3: Using Shipping or Receive slip, Return items

1. Click on simulation link from chat window; switch over to your browser
2. Click on Received status, *Return* items individually or using Bulk Action
3. When finished, go to Participants Panel in WebEx, & give a green check mark 
4. If you have problems, go to Participants Panel in WebEx, & give a red X ,  or raise your hand  and we'll un-mute your phone

Exercise 4: Using Shipping slip or label, Check in items

1. Click on simulation link from chat window; switch over to your browser
2. Click on Returned status, *Check In* items individually or using Bulk Action
3. When finished, go to Participants Panel in WebEx, give a green check mark 
4. If you have problems, go to Participants Panel in WebEx, & give a red X ,  or raise your hand  and we'll un-mute your phone

Searching For Requests



[Standard](#) | [Advanced](#) | [Results](#) | [Bulk Action](#) | [Create](#) | [Batch Update](#) | [Saved Searches](#) | [Work Queue](#)

Request Search

- ILL numbers (ILL no, Local Request Number)
- Item Number
- ISxN
- Requested Title
- Patron Barcode
- Patron Name
- Request Due Date
- Borrower Code
- Lender Code

Search Criteria

Searching for Requests

Records per page

10 ▾

[Search](#) [Reset Form](#)

Brief Results



NRE

[Standard](#) | [Advanced](#) | [Results](#) | [Bulk Action](#) | [Create](#) | [Batch Update](#) | [Saved Searches](#) | [Work Queue](#) | [Print](#)

- Search
- Requests
- Work Queue
- User
- Locations
- Reports
- Batch Reruns
- Logout
- Help

User ID
BLUESTA...

Results for: Requested Title

Sort by descending ascending
Sort by descending ascending

Sort

[Save Search](#)

Number of Results: 3

Bulk Action: [Select all](#) [Deselect all](#) [Clear all](#) [Bulk Action](#) [Unlock](#) [Lock](#)

Our Number : Their Number *** Borrower : Lender ** Barcode

17105 : 17139 *** Blue : Red

Burn collector : collected stories from one through nine

Al Burian

Status: **Pending:** Authorisation: **Processed** Last Action: **REQUEST:20 Apr 2011** Lender string: 1 of 1

[Action](#) [Details](#) [Acknowledge](#) [Print](#)

17169 : 17196 *** Blue : Red

Head first HTML with CSS & XHTML

Elisabeth Freeman

Status: **Pending:** Authorisation: **Processed** Last Action: **Send Public Note:23 May 2011** Lender string: 1 of 1

[Action](#) [Details](#) [Acknowledge](#) [Print](#)

17166 : 17199 *** Blue : Red

One hundred years of solitude

Gabriel Garcia Marquez

Status: **Recall:** Authorisation: **To be Acknowledged** Last Action: **Recall-Indication:23 May 2011** Lender string: 1 of 1

[Action](#) [Details](#) [Acknowledge](#) [Print](#)

Request Details



Request Details

Reports available:

Actions available:

Request Details

Request ID

Our Number 17083
Their Number 17132
Item Format Monograph

Status Pending

Authorisation Status Processed

Service Details

Service 1

Service Type Loan
Media Type Printed

Service 2

Service Type None
Media Type None

Item Details (Monograph)

Title The magic of tone and the art of music
Subtitle

▼ [Item Details \(Monograph\)](#)

Title The magic of tone and the art of music
Subtitle
Author Dane Rudhyar
Series Title & Numbering
Sponsoring Body
Publisher Shambhala
Place of Publication Boulder, Colo
Date 1982
Edition
Any Edition
Item Description
ISBN
Volume
UPC
Classmark
Call Number
Additional Nos
Ref. Source Train Email

▼ [Control Numbers](#)

OCLC 8031715

▼ [Patron Details](#)

Name REDPAT
User ID REDPAT
Patron ID 211
Patron Status NO_ID

▼ [Control Numbers](#)

OCLC 8031715

▼ [Patron Details](#)

Name REDPAT
User ID REDPAT
Patron ID 211
Patron Status NO_ID

▼ [Additional Service Details](#)

Requested By Red
Service Level Normal - Local Search
Number of Items Shipped 1
Entry Date (EST) 20 Apr 2011 17:00:38
Need by Date 20 May 2011

▼ [Delivery Details](#)

Delivery Method Postal Delivery

Send To

Red
1234 W 1st
Red Town
12345

Pickup Location [Red](#)

▼ [Lender String Details](#)

Seq

Location

Status

▾ [Additional Service Details](#)

Requested By Red

Service Level Normal - Local Search

Number of Items Shipped 1

Entry Date (EST) 20 Apr 2011 17:00:38

Need by Date 20 May 2011

▾ [Delivery Details](#)

Delivery Method Postal Delivery

Send To

Red
1234 W 1st
Red Town
12345

Pickup Location [Red](#)

▾ [Lender String Details](#)

Seq	Location	Status
1	Blue	

▾ [History](#)

Lender	Action	Status	Date Changed (EST)
Blue	REQUEST	Pending	20 Apr 2011 17:01:02

Reports available:

Actions available:

Searching Demonstration

<http://texas.vdxhost.com/nre>

Searching Exercise

Log on to Navigator <http://texas.vdxhost.com/nre>

User ID: Your OCLC symbol with "01" at the end

Password: Staff (with at Capital "S")

Borrowing Exceptions

Borrowing Exceptions



- As a Borrower you:
 - Need to request a renewal
 - Respond to a recall or overdue
 - Respond to lender conditions
 - Terminate a request
 - Send a note
 - Handle an unfilled request
 - Complete a request

Request a Renewal



17167 : 17198 *** Blue : Red ** 987654321

Mason & Dixon

Thomas Pynchon

Status: **Received:** Authorisation: **Processed** Last Action: **Received:20 May 2011** Lender string: 1 of 1

Renew [Action] [Details] [Mark as Read] [Print]

- Renew
- Returned
- Damaged
- Lost
- Add Private Note
- Complete
- Cost Adjustment
- Local Change Request Details
- Send Public Note
- Send User Alert

Request a Renewal



[Request](#)

Action: [Renew](#)

[Renew](#) [Reset](#)

Our Number 17167
Status Received
Title Mason & Dixon
Author Thomas Pynchon

Due Date 15 Jul 2011

Desired Due Date  (e.g. 10 Jun 2009)

Item Barcode - Borrower 987654321

Item Barcode - Lender 123456789

Public Note

Private Note

Patron Note

[Renew](#) [Reset](#)

Demonstration

<http://texas.vdxhost.com/nre>

Request a Renewal Exercise

<http://texas.vdxhost.com/nre>

User ID: Your OCLC symbol with "01" at the end

Password: Staff (with at Capital "S")

Respond to a Recall or Overdue



17199 : 17166 *** Blue : Red

One hundred years of solitude

Gabriel Garcia Marquez

Status: **Recall:** *Authorisation:* **Processed** *Last Action:* **Recall:23 May 2011**

Add Private Note

Action



Details



Mark as Read



Print

Respond to a Recall or Overdue



Request

Action: Returned

[Return](#) [Reset](#)

Our Number 17166

Status Recall

Title One hundred years of solitude

Author Gabriel Garcia Marquez

Return Date  (e.g. 10 Jun 2009)

Returned Via

Insured Amount

Insured Currency

Public Note

Private Note

Patron Note

[Return](#) [Reset](#)

Respond to a Lender's Conditions



Conditional

1

17209 : 17177 *** Blue : Red

The soul of cinema : an appreciation of film music

Larry M Timm

Status: **Conditional:** Authorisation: **Processed** Last Action: **Answer Conditional:03 May 2011**

Conditional Reply-Yes

Action



Details



Mark as Read



Print

Respond to a Lender's Conditions



Request

Action: Conditional Reply-Yes

[Reply](#) [Reset](#)

Our Number 17177

Status Conditional

Conditional Reason special collections supervision required

Date in Answer 03 May 2011

Title The soul of cinema : an appreciation of film music

Author Larry M Timm

Public Note

Private Note

Patron Note

[Reply](#) [Reset](#)

Respond to a Lender's Conditions Demonstration

<http://texas.vdxhost.com/nre>

Terminate a Request



17207 : 17179 *** Blue : Red

Valis

Philip K Dick

Status: **In Process**: Authorisation: **Unread** Last Action: REQUEST-Indication:20 Apr 2011

Terminate Request  Action  [Details](#)  [Mark as Read](#)  [Print](#)

Terminate a Request



Request

Action: Terminate Request

[Terminate](#) [Reset](#)

Our Number 17179
Status Pending
Title Valis
Author Philip K Dick

Click the Action button to terminate this request

Private Note

[Terminate](#) [Reset](#)

Terminate a Request Demonstration

<http://texas.vdxhost.com/nre>



OCLC™

The world's libraries.
Connected.

Send a Note



17208 : 17178 *** Blue : Red

A canticle for Leibowitz

Walter M Miller

Status: **In Process:** Authorisation: **Unread** Last Action: **REQUEST-Indication:20 Apr 2011**

Send Public Note

Action



Details



Mark as Read



Print

Send a Note



Request

Action: Send Public Note

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

Our Number 17178

Status Pending

Title A canticle for Leibowitz

Author Walter M Miller

Public Note

Private Note

Patron Note

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

Send a Note to a User



NRE

[Standard](#) | [Advanced](#) | [Results](#) | [Bulk Action](#) | [Create](#) | [Batch Update](#) | [Saved Searches](#) | [Work Queue](#) | [Print](#)

- Search
- Requests
- Work Queue
- User
- Locations
- Reports
- Logout
- Help

Results for: Returned

Sort by descending ascending
Sort by descending ascending

[Save Search](#)

Number of Results: 2

User ID
BLUESTA...

Bulk Action: [Select all](#) [Deselect all](#) [Clear all](#)

Our Number : Their Number *** Borrower : Lender ** Barcode

17228 : 17231 *** Blue : Red

A short history of nearly everything

Bill Bryson

Status: **Returned:** Authorisation: **To be Acknowledged** Last Action: **Recall-Indication:03 May 2011**

Lender string: 1 of 1

[Details](#) [Acknowledge](#) [Print](#)

17220 : 17237 *** Blue : Red

Australian beach houses : living by the sea

Jenna Reed Burns

Status: **Returned:** Authorisation: **To be Acknowledged** Last Action: **Overdue-Indication:03 May 2011**

[Details](#) [Acknowledge](#) [Print](#)
 [Details](#) [Acknowledge](#) [Print](#)

End of Results

Number of Results: 2

Send a Note to a User



Request

Action: [Send User Alert](#)

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

Request Details

Our Number 17228
Their Number 17231
Status Returned
Title A short history of nearly everything
Author Bill Bryson
Patron Name BLUEPAT
Patron Email address navigator.patron@gmail.com

Service Details

Service Type 1 Loan
Received Date 26 Apr 2011
Return Date 26 Apr 2011

Notes

Private Note

Patron Note

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

Send Public Note, Send User Alert Demonstration

<http://texas.vdxhost.com/nre>

Requests that cannot be filled in the group can be sent to:

- WorldShare ILL
 - Managed in NRE
- ILLiad
 - Managed in ILLiad
- Stopped
 - Note to user or staff

Unfilled Requests from WorldShare ILL



Borrower	
Status	Count
Idle / Check Manual	0
Idle / Auth Manual	0
Pending > 2 weeks	1
Pending	1
End of Lender String	1
Terminated	0

Requests Not Sent to a Lender

Idle / Check Manual

2

- The requested item is held locally
 - Complete or “Request” the request
- The request is a duplicate
 - Complete or “Request” the request
- No consortium holding and no link to ILLiad or WCRS
 - Complete the request

Complete a Request



17225 *** Blue

Ghostwritten : a novel

David Mitchell

Status: **Idle** Authorisation: **Check Manual** Last Action: **REQUEST** Lender string: 1 of 1

Complete ▼ Action  [Details](#) Mark as Read  [Print](#)

REQUEST
Terminate Request
Complete
Add Private Note
Send User Alert

Complete a Request



Request

Action: Complete

[Complete](#) [Reset](#)

Request Details

Our Number 17225

Status Idle

Title Ghostwritten : a novel

Author David Mitchell

Patron Name BLUEPAT

Patron Email address navigator.patron@gmail.com

Service Details

Service Type 1 Loan

Notes

Private Note

[Complete](#) [Reset](#)

Lending Exceptions

Lending Exceptions



- As a Lender you:
 - Cannot supply an item
 - Supply an item later
 - Need to set conditions on a loan
 - Send an overdue
 - Recall an item
 - Respond to a renewal requests
 - Respond to a cancel request
 - Send a note
 - Reprint pick lists or other lists

Lender Cannot Supply



17212 : 17174 *** Blue : Red

Garden anywhere : how to grow gorgeous container gardens, herb

Alys Fowler

Status: **Completed - Not Supplied:** Authorisation: **Processed** Last Action: **Answer Nonsupply:23 May 2011** Completed Date: **23 May 2011**

Answer Nonsupply



[Details](#)



Mark as Read



[Print](#)

Lender Cannot Supply

Request

Action: Answer Nonsupply

Not Supplied [Reset](#)

Our Number 17212

Status In Process

Title Garden anywhere : how to grow gorgeous container gardens, herb

Author Alys Fowler

Reason

Public Note

at bindery
charges
cost exceeds limit
critical extension not supported
expiry not supported
in process

Private Note

in use on loan
lacking
lacks copyright compliance
locations not found
lost
mandatory messaging not supported
non circulating
not_on_shelf
not found as cited
not owned
on hold
on order
on reserve

Not Supplied [Reset](#)

Answer Non-Supply Demonstration

<http://texas.vdxhost.com/nre>



OCLC™

The world's libraries.
Connected.

Answer Non-Supply Exercise

<http://texas.vdxhost.com/nre>

User ID: Your OCLC symbol with "01" at the end

Password: Staff (with at Capital "S")

Supply an Item Later



17189 : 17155 *** Blue : Red

The killer angels

Michael Shaara

Status: **In Process:** *Authorisation:* **Unread** *Last Action:* **REQUEST-Indication:20 Apr 2011**

Answer Will Supply

Action



Details



Mark as Read



Print

Supply an Item Later

Request

Action: Answer Will Supply

[Will Supply](#) [Reset](#)

Our Number 17189

Status In Process

Title The killer angels

Author Michael Shaara

Reason

Answer Date

Public Note

Private Note

[Will Supply](#) [Reset](#)

Supply an Item Later Demonstration

<http://texas.vdxhost.com/nre>

Set Conditions on a Loan



17203 : 17162 *** Blue : Red

Silent spring

Rachel Carson

Status: **In Process**: Authorisation: **Read** Last Action: **REQUEST-Indication:20 Apr 2011**

Answer Conditional

Action

 [Details](#)

 Mark as Read

 [Print](#)

Set Conditions on a Loan



Request

Action: Answer Conditional

[Reply](#) [Reset](#)

Our Number 17203

Status In Process

Title Silent spring

Author Rachel Carson

Reason

Answer Date

Proposed Delivery Method

Public Note

Private Note

- charges
- client signature required
- cost exceeds limit
- lacks copyright compliance
- library use only
- no reproduction
- other
- prepayment required
- proposed delivery service
- responder specific
- special collections supervision required

[Reply](#) [Reset](#)

Set Conditions on a loan Demonstration

<http://texas.vdxhost.com/nre>

Send an Overdue



17237 : 17220 *** Blue : Red

Australian beach houses : living by the sea

Jenna Reed Burns

Status: **Overdue**: Authorisation: **Processed** Last Action: **Overdue:16 Jun 2011**

Overdue

Action

[Details](#)

Mark as Read

[Print](#)

Send an Overdue



Request

Action: Overdue

[Overdue](#) [Reset](#)

Our Number 17237

Status Overdue

Title Australian beach houses : living by the sea

Author Jenna Reed Burns

Due Date  (e.g. 10 Jun 2009)

Public Note

Private Note

[Overdue](#) [Reset](#)

Recall an Item



17046 : 17106 *** Red : Blue

The poisonwood Bible : a novel

Barbara Kingsolver

Status: Pending: Authorisation: Processed Last Action: REQUEST:20 Apr 2011 Lender string: 1 of 1

Recall  [Details](#) Mark as Read  [Print](#)

Recall an Item



Request

Action: Recall

[Recall](#) [Reset](#)

Our Number 1415
Status Shipped
Title The poisonwood Bible : a novel
Author Barbara Kingsolver

Public Note

Private Note

[Recall](#) [Reset](#)

Send Overdue & Recall Notices Demonstration

<http://texas.vdxhost.com/nre>

Respond to a Renewal Request



Renewal Requested

1

17755 : 17754 *** Blue : Red

day of atonement

Status: Renew / Pending: Authorisation: Unread Last Action: Renew-Indication: 19 May 2011

Renew Answer-Yes

Action



Details



Mark as Read



Print

Respond to a Renewal Request



Request

Action: Renew Answer-Yes

[Reply](#) [Reset](#)

Our Number 17755

Status Renew / Pending

Title day of atonement

Due Date  (e.g. 10 Jun 2009)

Public Note

Private Note

[Reply](#) [Reset](#)

Respond to Renewal Request Demonstration

<http://texas.vdxhost.com/nre>

Respond to a Cancel Request



Cancel Requested

1

95:87

The presidencies of William Henry Harrison & John Tyler

Peterson, Norma Lois. | ISBN: 0700604006 (alk. paper) : \$29.95;9780700604005 (alk. paper)

Status: **Cancel Pending** *Authorisation:* **To be Acknowledged** *Last Action:* **Cancel-Indication: 05 May 2009**



Broker

Cancel Reply-Yes



Action



Details



Acknowledge



BL Art Format



Print

Respond to a Cancel Request Demonstration

<http://texas.vdxhost.com/nre>

Send a Note



☐ 17200 : 17165 *** Blue : Red

Colossus : Hoover Dam and the making of the American century

Michael A Hiltzik

Status: **In Process:** Authorisation: **Unread** Last Action: **REQUEST-Indication:20 Apr 2011**

Send Public Note

Action

 Details

 Mark as Read

 Print

Send a Note



Request

Action: Send Public Note

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

Our Number 17200

Status In Process

Title Colossus : Hoover Dam and the making of the American century

Author Michael A Hiltzik

Public Note

Private Note

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

Reprint Pick Lists or Other Lists



NRE

[Standard](#) | [Advanced](#) | [Results](#) | [Bulk Action](#) | [Create](#) | [Batch Update](#) | [Saved Searches](#)

[Search](#)

[Requests](#)

[Work Queue](#)

[User](#)

[Locations](#)

[Reports](#)

[Logout](#)

[Help](#)

User ID
ORANGES...

Work Queue

Borrower	
Category	Count
Idle / Check Manual	0
Pending	21
Pending > 4 days	21
Pending > 2 weeks	21
Terminated	0
End of lender string	0
Conditional	0
Cancel Pending	0

Lender
Category
New Requests
New Requests Expiring
Will Supply
Conditional
Cancel Requested

Reprint Pick Lists or Other Lists



NRE

[Search](#)

[Requests](#)

[Work Queue](#)

[User](#)

[Locations](#)

[Reports](#)

[Logout](#)

[Help](#)

User ID
ORANGES...

Reports

- Average and maximum supply times by supplier
- Average and maximum supply times to requesters
- Batch Reruns
- Copy requested per title
- Copy supplied per title
- Daily Request Statistics
- Incoming requests by requester
- Loan requested per title
- Loan supplied per title
- Monthly Request Statistics
- Outgoing requests by supplier
- Requests not supplied received
- Requests not supplied sent
- Requests Shipped but not Received

Start Date (e.g. 1 Apr 2007)

End Date (e.g. 10 Jun 2007)

[Generate Report](#) [Reset Query](#)

Reprint Pick Lists or Other Lists



NRE

[Search](#)

[Requests](#)

[Work Queue](#)

[User](#)

[Locations](#)

[Reports](#)

[Logout](#)

[Help](#)

User ID
ORANGES...

Batch Reruns

[Generate Report](#)

Rerun	Batch Date	Batch Number	Description	User ID	Items in batch
<input checked="" type="radio"/>	APR 07, 10:52	1	Standard Pick List	TRAIN61	29

Reprint a Pick List Demonstration

<http://texas.vdxhost.com/nre>



OCLC™

The world's libraries.
Connected.

In conclusion...



- We saw an example of the patron interface for Navigator
- We reviewed the Navigator workflow
- We also reviewed the meanings of the statuses in the Work Queue for both the Borrower and Lender

In conclusion...



- We reviewed the four Basic Processing Actions in Navigator the actions that we will do the most when processing requests:
 - Shipping items that users from other libraries have requested from your library
 - Receiving items your users have requested from other libraries
 - Returning other libraries' items that your users have finished borrowing
 - Checking in items other libraries have sent back to your library

In conclusion...



- We used Navigator's Standard Search to search for requests that we may want to process individually
- We handled exceptions that may arise for both Borrowers and Lenders in Navigator- Renewals, Overdues, Recalls, Conditionals, etc.

Thank you!



This is the end of Part 2 of the Navigator training.

Please fill out an evaluation of this training here:

<http://www.surveymonkey.com/s/OCLCTrainingCourse>

When you are ready to go live with Navigator, contact:

worldcatnavigatorIM@oclc.org

There will be a Q&A webinar this Thursday. Be on the lookout for an invitation to it.