

Navigator

Quick Reference: Checking In


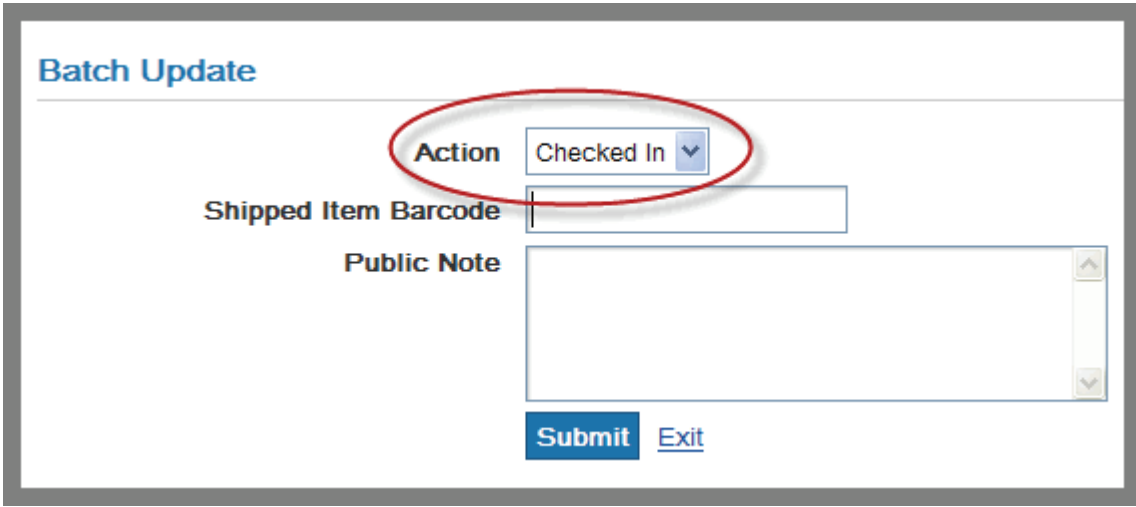
The Basic Check-in Process

When an item you have lent to a borrowing library is returned to you, you must perform a Checked In action to finish the request in **NRE**. This will send a message to the borrowing library that you have received the item back. Once you check the item in, the request will automatically be completed and removed from the Work Queue since the request has reached the end of its life cycle.

Batch Update

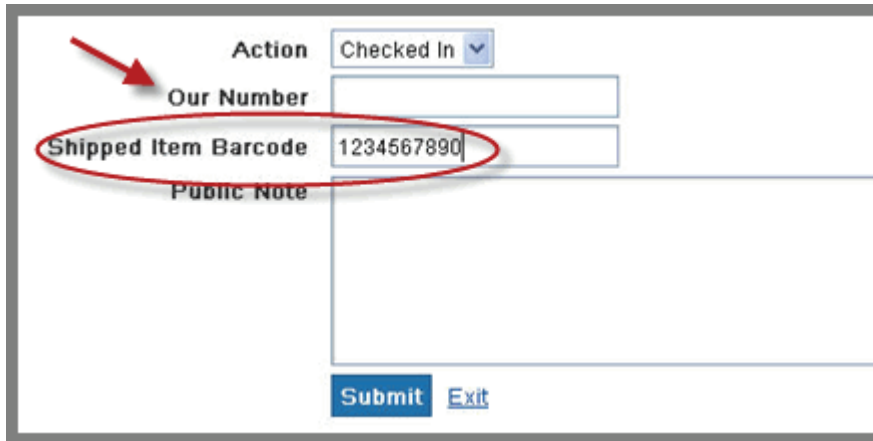
When you have received an item back from the borrowing library, you need to change the status of the request to Checked In.

The quickest way to mark items as **Checked In** is to use the Batch Update. This is accessed from the menu at the top of the NRE staff interface.

Step	Action
1	<p>The Batch Update option is accessed from the top of the NRE interface:</p> 
2	<p>On the Batch Update screen, select Checked In as the action.</p>  <p>Enter or scan the barcode of the item in the Shipped Item Barcode field. This allows NRE to identify the request that is being checked in. Alternately, you may enter the Request Number in the Our Number field to identify the item, if your system is</p>

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configured to display this field (see below).



The screenshot shows a web form for checking in an item. It features the following elements:

- Action:** A dropdown menu currently showing "Checked In".
- Our Number:** An empty text input field.
- Shipped Item Barcode:** A text input field containing the value "1234567890".
- Public Note:** A large text area for entering a note.
- Buttons:** "Submit" and "Exit" buttons at the bottom.

3	You can also enter a note in the Public Note field. This note will be sent to the Borrower with the response that indicates that you have checked in the item.
4	Click the Submit button.
5	Once the request has been checked in by NRE, the screen will refresh with Checked In as the action. You can then fill in the screen again to check in another item.

Checking In Items Individually

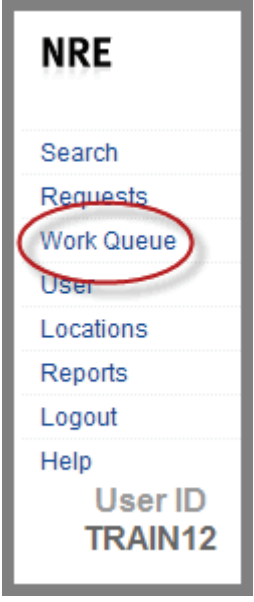
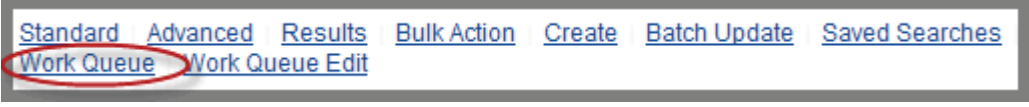
If you don't have a high volume of requests, or if you don't have the barcode of an item to be checked in, you may find it more convenient to check items in individually. There are two ways to check in an individual item:

- The Work Queue
- The Request Search

Let's look at both methods.

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Using the Work Queue

	Action
1	<p>Access the NRE Work Queue, either by selecting it from the left-hand panel or by clicking the link at the top of the NRE staff interface screen.</p>  
2	<p>In the Lender area of the Work Queue, click on the number corresponding to the Returned requests:</p>

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Lender	
Category	Count
New Requests	7
New Requests Expiring Today	0
Will Supply	0
Conditional	0
Cancel Requested	3
Messages	0
Staff Review	0
Shipped	3
Returned	2

- 3 On the resulting hitlist display, select Checked In on the drop-down menu. Click the **Action** button.

1367 : 1366 *** Train 1-01 : Train 1-02 ** 1111

Glimmerings of truth : being a collection of poems / by William Henry Cumpston.

Cumpston, William Henry.

Status: **Shipped**: Authorisation: ~~To be Acknowledged~~ Last Action: ~~Returned~~ Indication: 16 Dec 2009

Checked In [Details](#) [Acknowledge](#)

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4

Request

Action: Checked In

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

Our Number 1367
Status Shipped
Title Glimmerings of truth : being a collection of poems / by William Henry Cumpston.
Author Cumpston, William Henry.

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

Shipped Item 1111

Public Note

Private Note

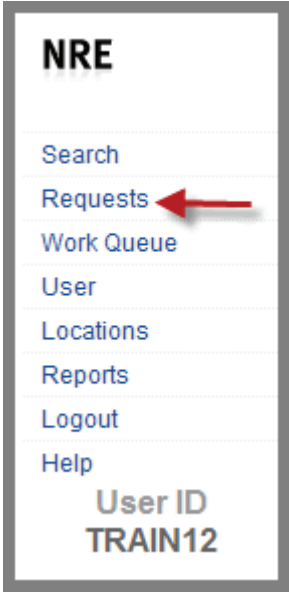
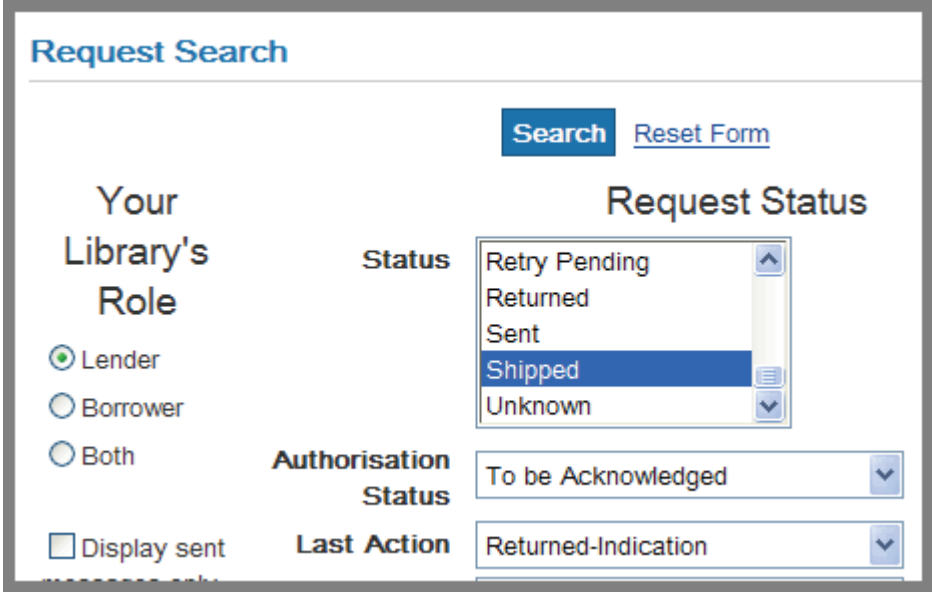
[Check In](#) [Reset](#)

The Check In Date defaults to today's date. You can modify it if needed. You can also enter a Public Note that will go to the Borrower, or a Private Note that will be seen only by your staff.

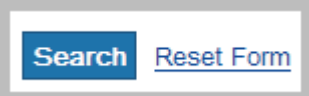
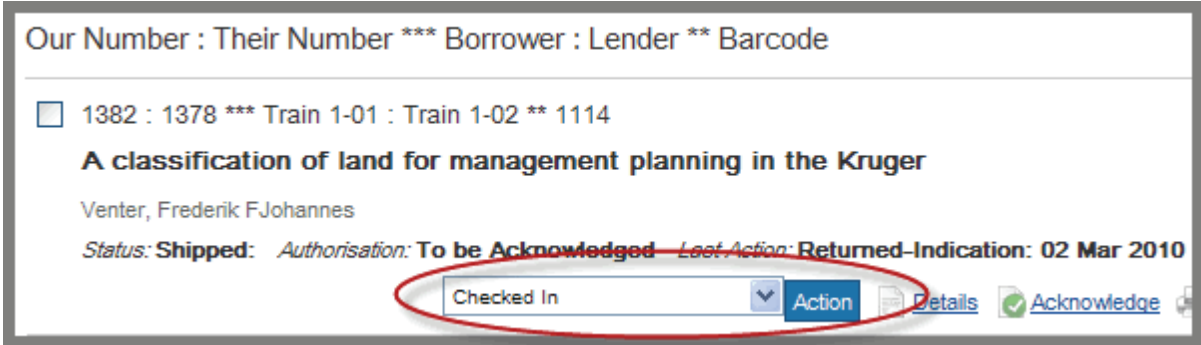
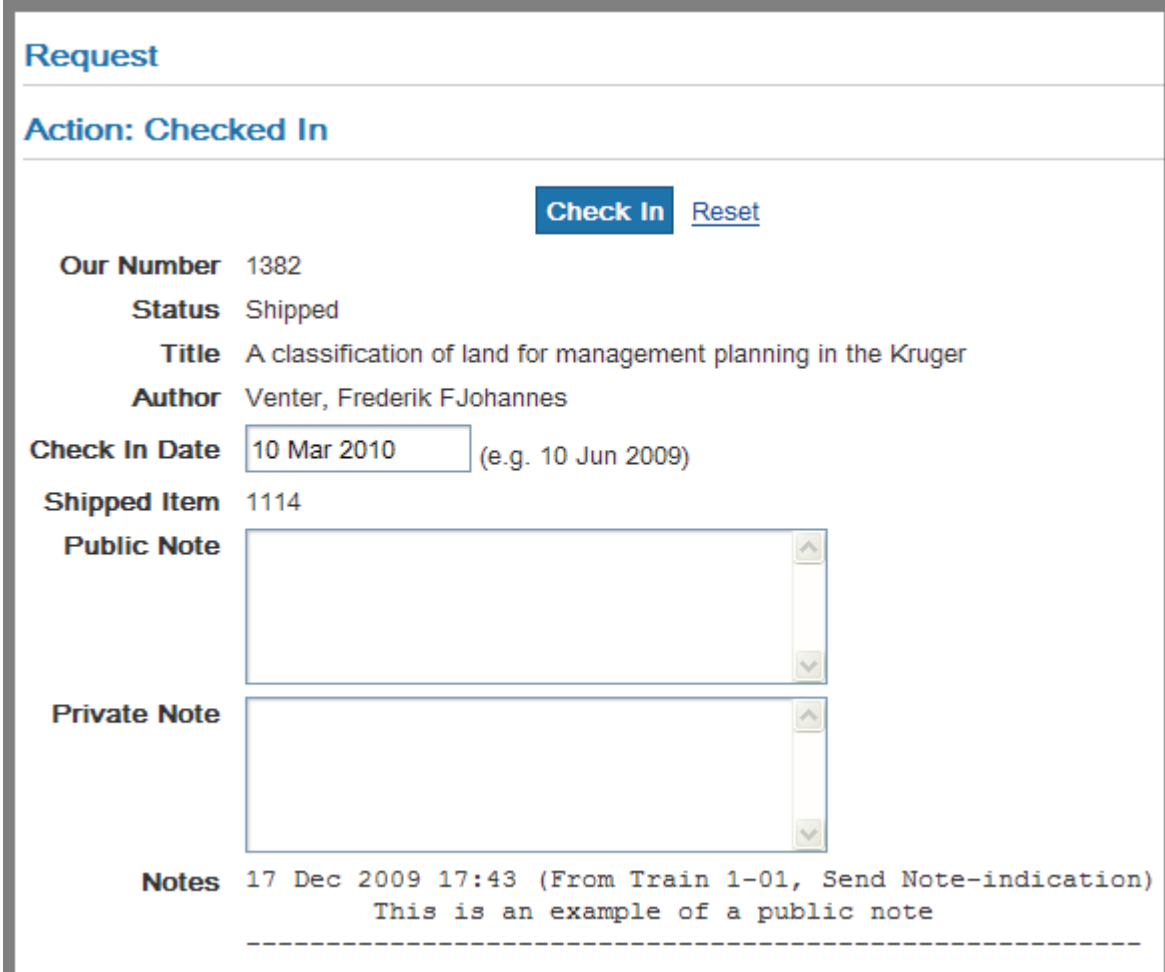
Click [Check In](#) when you are ready to check in the item in.

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Using the Request Search

Step	Action
1	<p>In the left-hand panel of the NRE interface, click Requests.</p> 
2	<p>On the Request Search screen, select the following settings:</p> <ul style="list-style-type: none">• Your Library's Role: Lender• Status: Shipped• Authorization Status: To Be Acknowledged• Last Action: Returned-Indication  <p>Next last action returned indication</p>

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3	Click Search. 
4	On the resulting hitlist display, select Checked In on the drop-down menu and click the Action button. 
5	 <p>Request</p> <p>Action: Checked In</p> <p>Check In Reset</p> <p>Our Number 1382 Status Shipped Title A classification of land for management planning in the Kruger Author Venter, Frederik FJohannes</p> <p>Check In Date <input type="text" value="10 Mar 2010"/> (e.g. 10 Jun 2009)</p> <p>Shipped Item 1114</p> <p>Public Note <input type="text"/></p> <p>Private Note <input type="text"/></p> <p>Notes 17 Dec 2009 17:43 (From Train 1-01, Send Note-indication) This is an example of a public note -----</p>

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The Check In Date defaults to today's date. You can modify it if needed. You can also enter a Public Note that will go to the Borrower, or a Private Note that will be seen only by your staff.

Click [Check In](#) when you are ready to check in the item in.

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Navigator Questionnaires and Support Material

The Check In workflow relates to the following questions from the questionnaires and spreadsheets provided by OCLC to individual libraries as part of the configuration phase of a Navigator implementation:

- What are your institution's lending and borrowing entities?
- What integrated library system (if any) does your library use?
- Does your library have an NCIP server?

The questionnaires and spreadsheets and other supporting material that your library uses to prepare for Navigator can be found at:

<http://www.oclc.org/us/en/navigator/support/default.htm> . They include:

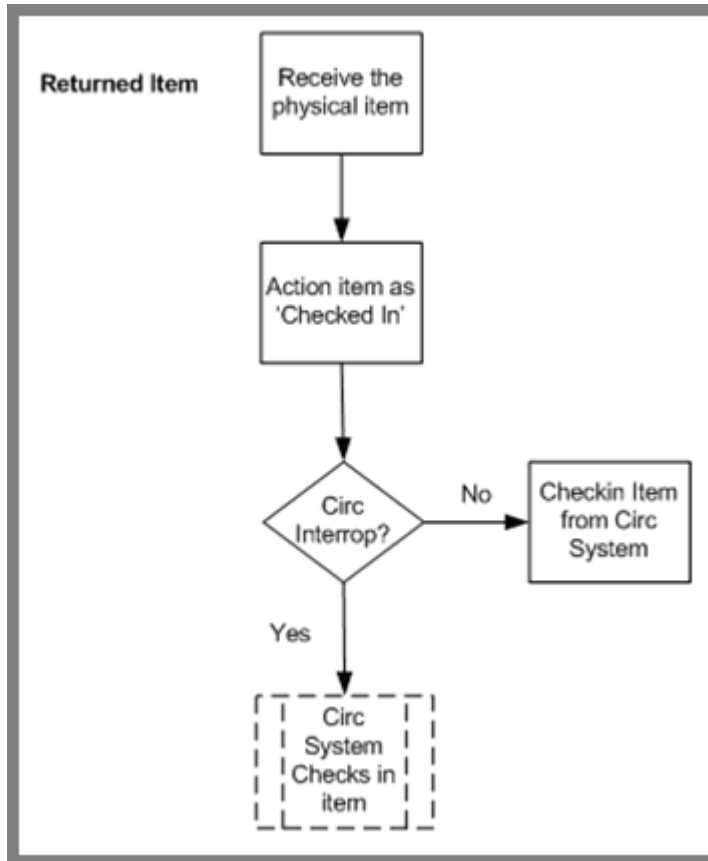
- Individual Library Questionnaire
- Navigator Planning Guide
- Institution Entities Spreadsheet (with instructions)
- Shelf Locations Spreadsheet

If you have already completed your Individual Library Questionnaire, you can use the supporting material listed above as a reference as you use the Navigator Consortial Borrowing service.

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Basic Workflow: Check In

The diagram that follows describes the basic Check In workflow.



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Support

OCLC support staff:

E-mail: support@oclc.org

Telephone: 1-800-848-5800 (USA) or +1-614-793-8682

(7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

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