

WORLDCAT NAVIGATOR Glossary

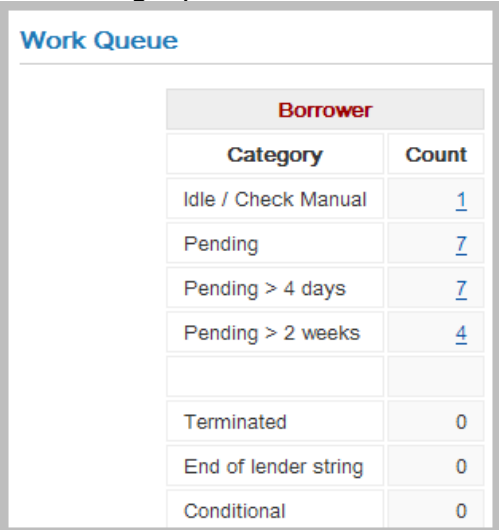


This Glossary contains terms and their definitions related to the WorldCat Navigator consortial borrowing service. It was last updated on August 10, 2010.

Your comments and suggestions are welcome. If you'd like to comment about this Glossary or suggest additional terms, please send an e-mail message to doc@oclc.org and include **Navigator Glossary** in the subject line.

Term	Definition
Actions	In NRE (Navigator Request Engine), actions taken on a request change the status of the request. Available actions are determined by the current status of a request and can be found in the drop-down menu next to the Action button in both Borrowing and Lending workflows. Changes in the status of a request are a direct result of an action performed by staff.
Advanced, Standard	The two methods of searching for bibliographic items or requests for library items in the NRE staff interface.
Alert	A message that an error condition has occurred. An alert can be a message posted to an online system that communicates essential information to users at logon, or it can be an e-mail message distributed to registered users of an online system. Alerts are often used to notify users that the online system is currently unavailable. In the NRE staff interface, system alerts are sent to patrons or staff via e-mail.
Answer Nonsupply	An action indicating that the lending library cannot supply a requested item. When this action is taken, the request moves to the next location on the borrowing library's lender string.
Authentication	A security procedure that verifies that a user is allowed to enter an online system (such as Navigator) and perform operations associated with the system. The authentication process can require the user to enter an ID and password.

Term	Definition
Authentication Service	Any service used by Navigator subscribers or patrons of Navigator-subscribing libraries that verifies that the librarian or library patron is authorized to use the Navigator staff interface or the WorldCat patron interface. EZproxy is one example of an authentication service.
Authorization status	An indication of the progress of an NRE request when an action is taken. When an action is first taken, the authorization status is Authorized . When NRE completes the processing of that action, the authorization status is Processed .
Auto-authorize	An NRE function that sends requests to the first Lender in the lender string when the request has been validated.
Automated (or Automatic) Hold	A specific configuration for Navigator that uses the Circulation Gateway to automatically place a hold for a patron in Millennium.
Auto-mediate	An NRE function that processes newly-created requests by validating the request, adding defaults to the request, and creating a lender string.
Availability	A generic term for the retrieval and display of information about the library that owns the item, the collection in which the item is housed, and its shelf status.
Ban	In the NRE staff interface, a system flag indicating whether a user is allowed to place requests. When Ban = Y, the user cannot place requests in Navigator.
Barcode	A printed label containing machine-readable data encoded in vertical lines of equal length but variable thickness, which can be read into an attached computer by an optical scanner. In libraries, barcodes are used to identify books and other materials for circulation and inventory and to link the borrower's library card to the appropriate patron record in automated circulation systems.
Barcode PIN	Personal Identification Number. A numeric code, often 4-6 digits long, used in conjunction with a barcode to identify someone as a valid user of a library system.
Batch update	A quick method of updating NRE requests to Shipped, Received, Returned and Checked In that does not require a search for the request before updating it. Because the Batch Update function includes shipped and circulating barcodes, it can be used with the Circulation Gateway to update the circulation system.

Term	Definition																				
Batchload	The Batchload process enables your library's records to be added to the WorldCat database so that your library's holdings can be included in a Navigator consortial resource sharing system. The records to be processed are collected into batches and loaded all at once.																				
Batchloading size	The number of records batch processed at one time using the OCLC Batchloading Service. OCLC can process up to 90,000 records in a single batch, depending upon the type of record and the level of processing. OCLC divides larger batchload files so that no batch contains more than 90,000 records. For example, OCLC may divide a batchload file of 98,000 records into batches of 90,000 and 8,000 records.																				
Bibliographic search	A search for a bibliographic item to initiate a request for a patron. Searches can be either Advanced or Standard. <i>See also Advanced/Standard.</i>																				
Blank workform	A template for creating an interlibrary loan request in the NRE staff interface.																				
Borrower column (Work Queue)	<p>The Borrower column in the NRE Work Queue contains the various statuses of requests that your library has created as a Borrower. Some of the status categories are:</p> <ul style="list-style-type: none"> • Pending • Received • Overdue • Returned <p>The number associated with each status category indicates the number of requests your library has in that status. Click on the number to display the requests in that category.</p>  <table border="1" data-bbox="540 1331 1036 1858"> <thead> <tr> <th colspan="2" data-bbox="703 1419 1019 1455">Borrower</th> </tr> <tr> <th data-bbox="703 1455 922 1503">Category</th> <th data-bbox="922 1455 1019 1503">Count</th> </tr> </thead> <tbody> <tr> <td data-bbox="703 1503 922 1545">Idle / Check Manual</td> <td data-bbox="922 1503 1019 1545">1</td> </tr> <tr> <td data-bbox="703 1545 922 1587">Pending</td> <td data-bbox="922 1545 1019 1587">7</td> </tr> <tr> <td data-bbox="703 1587 922 1629">Pending > 4 days</td> <td data-bbox="922 1587 1019 1629">7</td> </tr> <tr> <td data-bbox="703 1629 922 1671">Pending > 2 weeks</td> <td data-bbox="922 1629 1019 1671">4</td> </tr> <tr> <td data-bbox="703 1671 922 1713"></td> <td data-bbox="922 1671 1019 1713"></td> </tr> <tr> <td data-bbox="703 1713 922 1755">Terminated</td> <td data-bbox="922 1713 1019 1755">0</td> </tr> <tr> <td data-bbox="703 1755 922 1797">End of lender string</td> <td data-bbox="922 1755 1019 1797">0</td> </tr> <tr> <td data-bbox="703 1797 922 1839">Conditional</td> <td data-bbox="922 1797 1019 1839">0</td> </tr> </tbody> </table>	Borrower		Category	Count	Idle / Check Manual	1	Pending	7	Pending > 4 days	7	Pending > 2 weeks	4			Terminated	0	End of lender string	0	Conditional	0
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Term	Definition
Borrower, Borrowing library	The library requesting an item. Any institution borrowing something from you. You are the borrowing library when you or your patron requests and receives something from another library.
Bulk action	Located in the top menu bar in the Navigator staff interface, Bulk Action allows you to choose a group of records that require an identical action and to carry out that action in one step. An action is chosen from a drop-down menu and automatically applied to all selected requests. Navigator will display a report indicating which requests were successfully processed and which failed.
Cancel pending (status)	<p>The Borrower has initiated cancellation of the request but no response has yet been received from the Lender.</p> <p>For complete descriptions of request statuses in the NRE staff interface, please see the NRE Staff Help, located here.</p>
Cancel transaction	<p>The Cancel action causes the system to send a request to the current Lender location to cancel the request. The Lender location may decide to accept or reject the request to cancel. For example, it may already have shipped the item to you in between you entering the request and trying to cancel it.</p> <p>When the borrowing location uses the Cancel action, the status of the request becomes <i>Cancel Pending</i> until the Lender confirms cancellation.</p>
Cancelled (status)	The request transaction has been cancelled by the Lender.
Check out	A process whereby an item is removed from a library and loaned to a user of that library.
Checked in (status)	The item has been received back from the Borrower. The final action in the request life cycle. This action indicates that the physical item has been returned to the lending library. The request will automatically complete and be removed from the Work Queue. Performing this action in the NRE staff interface will automatically update the local circulation system if circulation integration has been integrated.
Circulating Item Barcode	The barcode assigned to a physical item while it is at a borrowing library. See also Barcode .
Circulation Gateway	Software linking NRE with the local library circulation system.

Term	Definition
Circulation inter-operability	When Navigator is linked to a local library's circulation system, resulting in automatic place holds and checking in and checking out of items.
Complete	This action ends the request on either the Borrower or Lender side. Some reasons requests are completed include 'can be supplied locally' or the request is at the end of its lifecycle. Used only when no further action can be taken.
Conditional (status)	This status indicates that a request can only be filled if the Borrower agrees to meet certain specified conditions.
Consortium	Any local, regional or national cooperative association of libraries. A cooperative arrangement whereby a group of libraries agree to pool their resources and share them through an interlibrary loan, or cataloging, or reference system. A library consortium is often, though not always, defined by geography, as in the case of a state-wide consortium.
Create	Introducing an NRE Request on behalf of a user. One way to do this is to find a bibliographic item from an NRE search of WorldCat and create the request.
Create User	Using the Create option from the top menu when in the Users domain.
Data file, Batchloading	A file containing MARC records of your library collection, submitted to OCLC via EDX as part of the Batchloading process. <i>See also EDX and Batchload.</i>
Deflection	Bypassing a library in a lender string. A decision process that can happen multiple times within the life-cycle of a request using lending rules set up by a lending library.
Details	Button in the NRE interface that enables you to view an entire Request in its current state, including bibliographic information, rota and request history.
DocFind	An NRE staff interface function that searches for appropriate lenders for each request and creates a lender string of responding libraries.
Due Date	Assigned when an item is received. Will be calculated based on loan rules.
End of Lender String	Completed requests that go through all potential lenders. The End of Rota (End of Lender String) count should normally be 0.
End of Rota	<i>See End of Lender String.</i>
EDX	Service offered by OCLC for the transfer of data via standard File Transfer Protocol (FTP) whereby an Electronic Data Exchange account is provided, into which OCLC posts bibliographic and authority records, label records, and reports. The institution retrieves files from the account via the Internet.

Term	Definition
Entity	<p>In the context of Navigator, entities are library units that can perform various functions in the consortial borrowing workflow. Entities can be:</p> <ul style="list-style-type: none"> • Your home library service desk. • A borrowing agency that receives and returns loaned items. Patrons will “belong” to a borrowing agency. • A lending agency that will use NRE to ship requested loan items and manage the check-in of material at the end of the process. • A location to which patrons may request that items be sent for pickup. <p>A single entity may perform one or more of these roles. Your library entities are defined in the Navigator Institution Entities Spreadsheet, which can be found here.</p>
Error	<p>A condition in which the NRE staff interface has encountered a situation that halts or prevents normal request processing. An example of an NRE error message is the following, which indicates that the Circulation Gateway has returned an error back to NRE:</p> <p style="color: red;">ILS Circulation System error on Illno <illno> for location <location code>, reason: CORBA::UserException: ServicesException</p> <p>If you encounter an error situation and are unsure how to handle it, contact your consortium technical support or contact OCLC support:</p> <p>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)</p>
ESIP protocol	Extended Standard Input Protocol. A protocol governing the exchange of information between libraries.
Expiry Date	Number of days a request is held and not acted upon before it automatically expires and is removed from the Lender Work Queue. In general, this will be 3 working days.
Ex Libris Aleph	An integrated library system (ILS) used to track circulation, acquisitions, and other library functions.
EX Libris Voyager	An integrated library system (ILS) used to track circulation, acquisitions, and other library functions.

Term	Definition
Exception processing	Processing interlibrary loan requests that fall outside the normal borrowing and lending workflow.
EZproxy	Computer software that authenticates library users against local authentication systems and provides remote access to licensed content based on the user's authorization. Please go here for more information.
FirstSearch	OCLC FirstSearch is an online reference service with a collection of databases, full text articles, full-image articles, library holdings, and interlibrary loan functions. It supports research in a wide range of subject areas with well-known bibliographic and full-text databases in addition to ready-reference tools such as directories, almanacs and encyclopedias.
FTP	File Transfer Protocol. A protocol that is generally available for file transfers to and from a large variety of hosts including IBM mainframes, Tandem Guardian systems, and Unix hosts. FTP is the method used to retrieve files from an OCLC EDX account. It is also used in the OCLC Electronic Batchload Service.
Group	Within the context of Navigator, <i>group</i> is used interchangeably with consortium .
Group availability	The availability of library items within a group, or consortium. The members of a library consortium can actualize group availability by adding their local holdings records to the group catalog that is created by the OCLC Implementation Manager.
Holding library	The library or collection within an institution that has an item needed by another library.
Holdings	The total stock of materials, print and nonprint, owned by a library or library system, usually listed in its catalog. Synonymous in this sense with library collection. In a narrower sense, all the copies, volumes, issues, or parts of an item owned by a library, especially a serial publication, indicated in a holdings statement in the record representing the item in the catalog. Holdings can be recorded in the MARC 21 Format for Holdings Information.
Holdings record	A record containing the location, status, and/or copies associated with a single bibliographic item of a specific publication held by a particular institution.
Home Library	The library at which a patron has borrowing privileges.
Idle (status)	Status that indicates a request is new and has not yet been processed, or that it cannot be processed without staff review.

Term	Definition
ILL	Interlibrary loan. When a book or other item needed by a registered borrower is checked out, unavailable for some other reason, or not owned by the library, a patron may request that it be borrowed from another library by filling out an interlibrary loan request form at a service desk or on the library's Web site. Some libraries also accept ILL requests via e-mail or telephone. Interlibrary loan is a form of resource sharing that depends on maintaining union catalogs.
ILL cycle	The interactions between a Borrower and a Lender during an interlibrary loan transaction.
ILL record	A record with an identification number created when a Borrower produces a workform, that is, sends the request to the first potential lender.
ILLiad	Resource sharing management software that automates routine interlibrary loan functions. The client/server software helps ILL staff manage a library's borrowing, lending and document delivery activities through a single Windows-based interface, and allows library users to submit and track their own requests via the Web or e-mail.
Illiad ID	User ID that authenticates a librarian or library patron as a valid user of ILLiad.
ILS	Integrated Library System. A system used to track holdings, acquisitions, circulation, serials and other library functions. An ILS is normally set up around a relational database. Each patron and library item held has a unique ID in the database that allows the ILS to track its activity.
ILS inter-operability	When a library subscribing to Navigator has an integrated library system, many of the routine functions associated with interlibrary loan processing, such as checking items in and out of an OPAC (Online Public Access Catalog) and printing pick lists are handled automatically, without requiring staff intervention.
In process (status)	A request has been received and is being processed by the Lender; the item has not yet been shipped.
Interlibrary loan	ILL. Borrowing or lending library materials outside of your home library or consortium.

Term	Definition
IP address	<p>Internet Protocol address. Every device connected to the public Internet is assigned a unique number known as an Internet Protocol (IP) address. IP addresses consist of four numbers separated by periods (also called a 'dotted-quad') and look something like 127.0.0.1.</p> <p>Since these numbers are usually assigned to Internet service providers within region-based blocks, an IP address can often be used to identify the region or country from which a computer is connecting to the Internet.</p>
ISO 10160/10161	<p>International communications standards that permit the exchange of ILL messages among ILL systems even if they use different hardware and software. The standards also control ILL transactions for both lending and borrowing activities.</p>
ISO ILL	<p>A standard for conducting ILL (interlibrary loan) activities between cooperating libraries that does not require the libraries to alter their existing ILL workflows and procedures.</p> <p>The goal of ISO ILL interoperability is to allow ILL staff to conduct interlibrary loans with other ISO ILL-compliant systems as easily and seamlessly as if both libraries were using the same system.</p>
Item Availability screen	<p>In the WorldCat user interface, the Item Availability screen displays the various options for obtaining a copy of an item, as a result of a search. The Item Availability screen also displays the various formats (book, recording, etc.) in which the item is available, as well as item location, availability status and call number.</p>
Items Held Locally	<p>When an item is held by the borrowing library, NRE will hold the request for staff intervention in the Idle/Manual queue. If the request can be filled from your collection, you can cancel the request from your local circulation system. If the request cannot be filled from your collection, you can remove your location from the lender string and allow the request to the next location.</p>
Label file, Batchloading	<p>A file describing the contents of the Data file that is sent to OCLC as part of the Batchloading process. A label file must contain the following five fields:</p> <ul style="list-style-type: none"> • DAT (the date the file was compiled) • RBF (number of records in the Data file) • DSN (exact name given to the Data file) • ORS (Institution symbol) see <i>OCLC symbol</i>. • FDI (project ID assigned to the Batchload project)

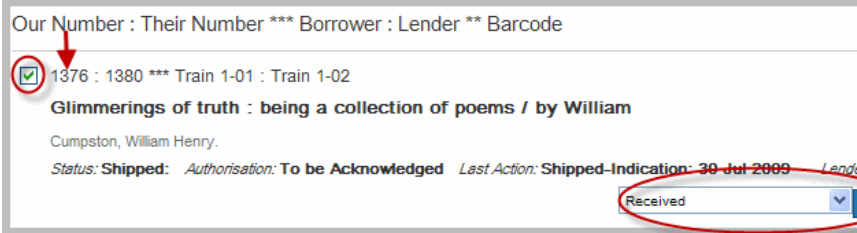
Term	Definition																																		
LDAP	<p>Lightweight Directory Access Protocol. An Internet protocol used by e-mail (and other) programs to access information from a server. LDAP is used to look up encryption certificates, printers, and other network services and can also be used to provide "single sign-on" access to a computer network, where one password for a user is used for multiple services.</p>																																		
Lender column (Work Queue)	<p>The Lender column in the NRE Work Queue contains the various statuses of requests that your library has created as a Lender. Some of the status categories are:</p> <ul style="list-style-type: none"> • New Requests • Conditional • Staff Review • Overdue Today <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: center; background-color: #f2f2f2;">Lender</th> </tr> <tr> <th style="text-align: center;">Category</th> <th style="text-align: center;">Count</th> </tr> </thead> <tbody> <tr> <td>New Requests</td> <td style="text-align: center;"><u>4</u></td> </tr> <tr> <td>New Requests Expiring Today</td> <td style="text-align: center;">0</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td>Will Supply</td> <td style="text-align: center;">0</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td>Conditional</td> <td style="text-align: center;">0</td> </tr> <tr> <td>Cancel Requested</td> <td style="text-align: center;">0</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td>Messages</td> <td style="text-align: center;">0</td> </tr> <tr> <td>Staff Review</td> <td style="text-align: center;">0</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td>Shipped</td> <td style="text-align: center;"><u>3</u></td> </tr> <tr> <td>Returned</td> <td style="text-align: center;"><u>1</u></td> </tr> </tbody> </table> </div>	Lender		Category	Count	New Requests	<u>4</u>	New Requests Expiring Today	0			Will Supply	0					Conditional	0	Cancel Requested	0					Messages	0	Staff Review	0			Shipped	<u>3</u>	Returned	<u>1</u>
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Term	Definition
Lender string	<p>A list of libraries, put together when a borrowing request is created in the NRE staff interface. The lender string is created according to protocols created by the library. Each library in the lender string is queried regarding its ability to supply a requested item. If the first library is unable to provide the item, the next library in the lender string is queried.</p> <p>A lender string is sometimes referred to as a rota.</p>
Lender Lending library	<p>A library supplying an item to another library. Or, any institution lending something to you. You are the lending library when you supply an item to another library.</p>
Lending	<p>A library that owns an item can lend it to a library that requests it. The life cycle of a request ends when the item is returned to the lending library.</p>
Licensed content	<p>Electronic content (e.g., e-journals, databases) for which a library has subscription access. Licensed content includes all editorial content published by the licensed publication or database during the period in which a site license is in effect.</p>
Loan Rules	<p>Loan entitlement period for loaned items.</p>
Loan Term	<p>The period of time for which a library item may be borrowed, either from a home library or through interlibrary loan.</p>
Local data	<p>Data in a record that is pertinent only to the institution cataloging the record. For example, local processing information and cataloger's notes are local data. Certain 9xx fields in a MARC record are reserved for local data.</p>
Local holdings format	<p>The communications format for representation and exchange of holdings data created at a library. It is often MARC 21 Holdings format that conforms to the ANSI/NISO standard with variations for local purposes.</p>
Local Holdings Maintenance	<p>OCLC service that helps libraries maintain accurate, current holdings information by providing a list of holdings for materials in any format, including serials.</p>
Local Request Number	<p>Number assigned to a request when it is initiated.</p>

Term	Definition
Location	<p>Where an item is kept in the library. Location codes are often used in online catalogs to show which library or part of a library has an item. This term can have several meanings in the context of Navigator:</p> <ul style="list-style-type: none"> • Shelving location, i.e., where an item can be found in the library. • Request managing location. In a multi-library location, e.g., a large university, the request managing location is the library that handles NRE loan requests. See <i>managing location</i>. • Home library. The library, or library system, at which a patron has borrowing privileges. • Pickup location. Each home library has a list of pickup locations, where requested items can be retrieved.
Lost (status)	A requested item is not available because it has been lost.
Managing location	In a multi-library location, e.g., a large university, the request managing location is the library that handles NRE loan requests.
Metasearch	A search for bibliographic information which sends a search request to several search engines or databases and aggregates the results into a single search results list. Libraries that subscribe to OCLC's WorldCat Local service have access to aggregated content from a variety of database providers.
Naming Authority	The entity responsible for the allocation and distribution of domain names. A naming authority is often restricted to a particular level of domains, such as .com, .net or .edu.
Navigator group catalog	Using OCLC symbols, your OCLC Implementation Manager constructs a group catalog from the records already cataloged in WorldCat by the members of your consortium. The resulting structure enables library users from your consortium to limit search results to, and view item availability only from those institutions within your group.
Navigator Request Engine (NRE)	A consortial borrowing and request management system. NRE allows users to search WorldCat for bibliographic records, display search results, and request delivery of items, all within the same interface. NRE is the staff interface for managing interlibrary loans between the libraries of a consortium, including interoperability with local circulation systems.

Term	Definition
NCIP	<p>NISO Circulation Interchange Protocol. NISO standard defining messaging between circulation systems, ILL systems or broker applications. This protocol is limited to the exchange of messages between and among computer-based applications enabling them to:</p> <ul style="list-style-type: none"> • Perform functions necessary to lend and borrow items • Provide controlled access to electronic resources • Facilitate co-operative management of these functions
Need by date	The date by which a borrowing library must have a requested item.
Nonsupplier	An institution that does not respond to interlibrary loan requests.
Not Supplied (status)	The request has reached a stage where it cannot be filled by the Lender.
Notification	An e-mail message sent from the NRE system to a patron or library staff member, alerting the recipient to a change in the status of a given request.
Not Received, Overdue (status)	The Lender has sent an overdue notification for an item that has not yet been received.
NRE backend process	Any NRE staff interface function that processes requests in the NRE database.
OCLC	Previously called Online Computer Library Center, Inc. and Ohio College Library Center. Nonprofit membership organization serving libraries around the world to further access to the world's information and reduce library costs by offering services for libraries and their users.
OCLC Batchloading Services	Automated method of processing bibliographic and local holdings records (LHR) submitted by libraries and vendors into WorldCat.
OCLC CatExpress	An OCLC service for copy cataloging.
OCLC control number (or OCLC number)	A unique accession number assigned by the OCLC system when a record is added to WorldCat. Used to search for records.
OCLC Customer Services Division (CSD)	OCLC's user assistance and support contact desk that provides support for telecommunications, hardware, and software. Formerly called OCLC User and Network Support (UNS).

Term	Definition
OCLC Policies Directory	Web-based repository of the copy and lending policies of libraries participating in WorldCat Resource Sharing. Information contained includes institution information (e.g., schedule, contacts, collections, web links), informational copy and lending policies, and deflection policies that allow requests to bypass an institution.
OCLC Product Services Web	See PSWeb .
OCLC symbol	A unique identifier assigned by OCLC to member libraries and other participants. OCLC symbols in records and in holdings displays identify libraries that have entered, modified, and used the bibliographic records for cataloging.
OCLC-derived records	Bibliographic records originally obtained from OCLC. Some institutions export records directly from OCLC into their local system, without setting holdings online. These records are then returned to OCLC as a batchload project to set and/or cancel the institution's holdings.
Offline Circ	A III module that can reside on local systems and is used to automate Check In and Check Out of items processed in NRE, eliminating the need to process items in both Navigator and Millennium.
Online Service Center (OSC)	A secure, Web-based tool that library staff with administrative authority can use to order OCLC products and services (such as Batchload projects) and also to view, update and manage their OCLC account information.
OPAC	An acronym for Online Public Access Catalog, a database composed of bibliographic records describing the books and other materials owned by a library or library system, accessible via public terminals or workstations, or via the Internet. Most online catalogs are searchable by author, title, subject, and keywords and allow users to print, download, or export records to an e-mail account.

Term	Definition
OpenURL	<p>A type of URL (Uniform Resource Locator) intended to enable Internet users to more easily find a copy of a resource. Though OpenURL can be used with any kind of resource on the Internet, it is most often used by libraries to help patrons find online articles.</p> <p>The OpenURL standard is designed to support mediated linking from information resources such as abstracting and indexing databases (sources) to library services (targets) such as academic journals, whether online or in printed or other formats. A "link resolver", or "link-server", parses the elements of an OpenURL and provides links to appropriate targets available through a library.</p>
Our Number	<p>The current library's unique NRE identifier for a request. In the NRE interface, after performing a search for a request, the request number (Our Number) is displayed in the hitlist for each record that matches the search criteria:</p>  <p>Our Number is used in the NRE Batch Update process.</p>
Overdue (status)	The Borrower has been notified that the item is overdue.
Overdue notice	A notice generated automatically by Navigator when a borrowed item has not been returned by the Due Date.
Paging slip	Contains bibliographic information useful in retrieving requested items. Shows staff where to find the requested item (library location and call number) and where to send the item (borrowing site). The Paging Slip can be generated from the NRE Pick List Report.
Patron Barcode Prefix	A 3-letter code corresponding to an institution's OCLC symbol.
Patron Category	Classifications of patrons (e.g., undergraduate, adult, juvenile) defined by each library.

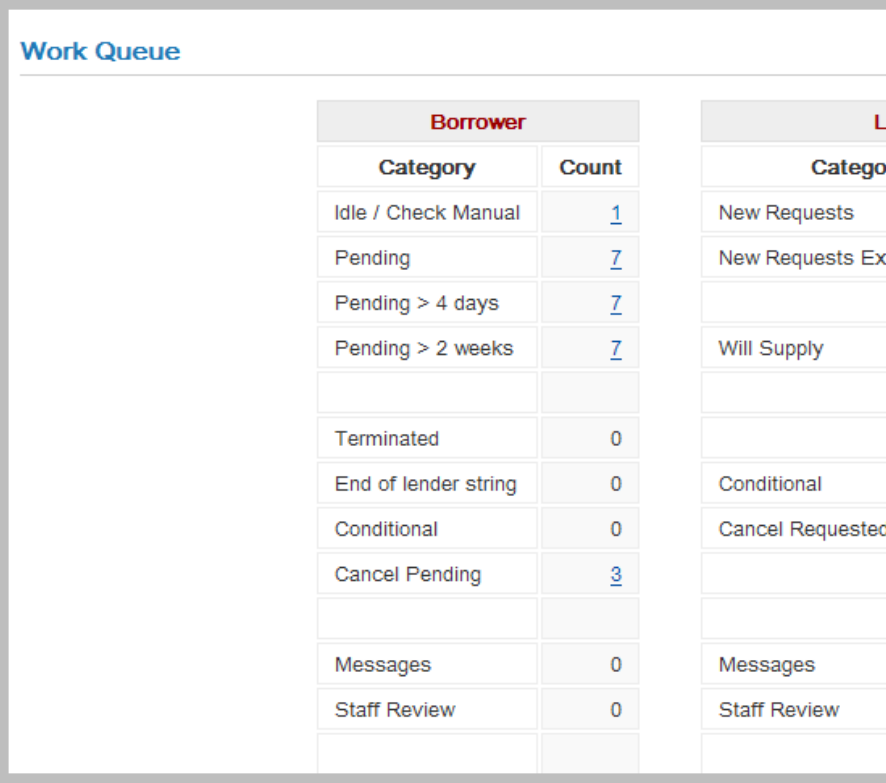
Term	Definition
PDF	Portable Document Format. The Adobe Acrobat standard that enables the same graphic display of a document on different platforms. Because the graphical display preserves hard-copy features such as page numbers, logical page breaks, tables of contents, etc., printing a PDF document makes a better hard copy than printing HTML-formatted documents. Most OCLC user documentation is available in PDF.
Pending (status)	A request has been made and the item is expected from the Lender. Or, a message has been received stating that the item will be supplied or the item has been placed on hold, or the request has been forwarded to another institution.
Picklist	A lending report that contains item details for requests, enabling staff to retrieve items from the shelf.
Pickup location	The location in the library where requested items can be retrieved by requesting patrons.
Place hold	Reserving a library item for a user. If an item is currently checked out, a place hold notifies the lending library that the item should be held until the patron at the requesting library can check it out. In the NRE system, the patron can also be notified when the item has become available.
Port number	In a computer network, port numbers are part of the addressing information used to identify senders and receivers of messages. Port numbers are most commonly used with TCP/IP connections.
PSWeb	Product Services Web. An OCLC Web site (http://psw.oclc.org/frames.aspx) from which users retrieve labels, records, and reports from their OCLC Electronic Data Exchange (EDX) accounts. It also provides OCLC software downloads, macros, scripts, and labels.
Publisher	One of the fields on the patron request form that provides bibliographic information about the requested item. For a book, the Publisher field contains place of publication, publisher, and publication date. For an article, it contains journal title, publication date, volume/issue, and page number. The field cannot be edited.

Term	Definition
Questionnaire	<p>When a library consortium subscribes to Navigator, the consortium administrator and each library in the consortium completes a questionnaire, providing OCLC with the information needed to configure and customize Navigator for their use.</p> <p>The questionnaires can be found at: http://www.oclc.org/us/en/navigator/support/prepare/default.htm and cover areas such as:</p> <ul style="list-style-type: none"> • Contact information for the consortium and its members • Holidays observed by consortium members • Delivery methods for interlibrary loans • Configuration of picklists and shipping lists • Branding and URLs for library OPACs
Reasons for No	A means of providing an ISO-specific reason to a Borrower when unable to lend a requested item.
Recall (status)	The item has been recalled by the Lender.
Received (status)	The item has been received from the Lender.
Renew, Overdue (status)	A request has been made for the renewal of an item that is now overdue.
Renew, Pending (status)	A request has been made for the renewal of an item.
Renewal notice	Notice sent to a lending library, indicating that the borrowing library would like to renew a borrowed item on behalf of a patron.
Report parameters	The date range covered by an NRE-generated report. <i>See also Reports.</i>

Term	Definition
Reports	<p>A number of reports can be run from the NRE Web client. Some of the most common of these are:</p> <div style="border: 1px solid gray; padding: 10px;"> <ul style="list-style-type: none"> <input checked="" type="radio"/> Average and maximum supply times by supplier <input type="radio"/> Average and maximum supply times to requesters <input type="radio"/> Batch Reruns <input type="radio"/> Copy requested per title <input type="radio"/> Copy supplied per title <input type="radio"/> Daily Request Statistics <input type="radio"/> Incoming requests by requester <input type="radio"/> Loan requested per title <input type="radio"/> Loan supplied per title <input type="radio"/> Monthly Request Statistics <input type="radio"/> Outgoing requests by supplier <input type="radio"/> Requests not supplied received <input type="radio"/> Requests not supplied sent <input type="radio"/> Requests Shipped but not Received <p>Start Date <input type="text"/> (e.g. 1 Apr 2007)</p> <p>End Date <input type="text"/> (e.g. 10 Jun 2007)</p> <p style="text-align: center;">Generate Report Reset Query</p> </div>
Request ID	The ID number attached to a request in NRE, to enable it to be tracked through the request life-cycle. Can either refer to the Borrower number or the Lender number.
Resource sharing	A cooperative activity whereby libraries lower acquisitions expenses by sharing their resources with one another through a system of interlibrary loans.
Retry Pending (status)	A request has been re-submitted but has not yet been acted on by a Lender.
Returned (status)	The item has been shipped back to the Lender.
Returned list	A list of library items that have been returned by borrowing libraries. Items remain on the list until they are checked in by the lending library.
Review file	A file that acts as a "holding tank" for patron-generated ILL requests forwarded through external systems or set aside for further consideration.
Rota	The string of potential lending libraries. An automatic routing system for loan requests.

Term	Definition
Screen scraping	A method of obtaining real-time location information and current availability of items in your library's collection. The following information can be "scraped," or scanned, from a detailed HTML record displayed on your library's OPAC: <ul style="list-style-type: none"> • shelving location • call number • item status (availability) • links to other areas of your OPAC
Search results	The results of a search for library materials, normally performed by a search engine such as that used in OCLC's WorldCat.org user interface. The search results can be displayed in a number of ways, e.g., according to relevancy with items in the searcher's home library displayed first.
Searching	The process of retrieving records from a database, such as the OCLC WorldCat database.
Sent (status)	A requested item has been shipped by the Lender.
Service level	An indication of how urgently a request is required by a patron or Borrower (e.g., "standard" service, "express" service").
Service type	Indication of whether a request is for the loan of an item or a copy of an article.
SFTP	SSH File Transfer Protocol. A network protocol designed to provide secure file transfer and manipulation facilities over SSH. Overrides FTP depending on context.
Shelving location	The place in the library where an item is located, or shelved. Also, the name that appears in the holdings, or item display in the public catalog.
Shipped (status)	The item has been shipped to the borrower.
Shipped Item Barcode	The identifying barcode for an item sent from a Lender library.
Shipping list	Report printed from the Work Queue, showing which items have been updated to Shipped, by date.
SIP protocol	Session Initiation Protocol. A TCP/IP-based application layer protocol. A text-based transmission protocol, incorporating many elements of the Hypertext Transfer Protocol (HTTP). SIP employs design elements similar to the HTTP request/response transaction model. Each transaction consists of a client request that invokes a particular method or function on the server and at least one response.
SIP II Protocol	Supersedes the original SIP, depending on context.

Term	Definition
SSL encryption	Secure Sockets Layer (SSL) encryption. A protocol developed for transmitting private documents via the Internet. SSL employs a cryptographic system to encrypt data. SSL is supported by Microsoft's Internet Explorer and is used by many Web sites to obtain confidential user information.
Staff review (status)	A request must be evaluated by lending library staff before it can be acted upon.
Standard reports	<p>Although the availability of individual reports depends on the setup of each Navigator system, the following reports are among the most commonly-used and are called "standard reports":</p> <ul style="list-style-type: none"> • Average and Maximum Supply Times by Supplier (Displays supply days for fulfilled requests received by your library.) • Average and Maximum Supply Times to Borrowers (Displays supply days for requests made of your library by other libraries.)
Status	The current position of a request in its life cycle. Some typical statuses: Idle, Returned, Pending, Lost, Cancelled, Overdue, Shipped, Not Supplied, Received.
Supplier	An institution that supplies items requested via a resource sharing system. The institution's interlibrary loan policies may determine what items the institution supplies.
System days	In resource sharing, days that exclude Saturdays, Sundays, holidays, or other days when interlibrary loan is unavailable. Also known as "non-referral days."
TCP/IP	Transmission Control Protocol/Internet Protocol. A set of standard rules that enables communication between similar or dissimilar computers on a network. Internet Protocol is the standard for sending data on the Internet.
Terminate Request	An NRE action that stops the request process when an item is no longer needed by the patron. Cancels the request with the current responder and does not forward the request to the next location in the lender string. The patron will the the request status as Cancelled.
URL	Uniform Resource Locator. Address or location of a Web page or other electronic resource.
User interface	The part of a software application that a user sees and interacts with.
Username	Administrative users in NRE are given a Username and a Password, which are associated with each library for which they have administrative privileges.

Term	Definition																																				
VDX	A resource sharing option for library groups that need greater local control of resource sharing with tight integration to local library systems. It builds on the foundation of OCLC's existing services for groups that include cataloging, resource sharing, reference and digitization services. The Navigator consortial borrowing system is based on VDX and shares many of its functions with VDX.																																				
WebEx	Web conferencing software that enables online meetings between people from distant locations. It enables document sharing from participants' computers.																																				
Webinar	A method of conducting live meetings, training sessions or conferences via the Internet. Each participant sits at his or her own computer and is connected to other participants via the Internet.																																				
Work Queue	In NRE, the main work area for staff handling loan requests. The Work Queue normally displays when you first log in to NRE.																																				
Work Queue Category	<p>The NRE Work Queue is divided into Borrower and Lender categories. Each category contains a separate request status:</p>  <table border="1" data-bbox="516 1014 1398 1791"> <thead> <tr> <th colspan="2" data-bbox="829 1115 1151 1150">Borrower</th> <th data-bbox="1211 1115 1398 1150">Lender</th> </tr> <tr> <th data-bbox="829 1161 1052 1197">Category</th> <th data-bbox="1052 1161 1151 1197">Count</th> <th data-bbox="1211 1161 1398 1197">Category</th> </tr> </thead> <tbody> <tr> <td data-bbox="829 1207 1052 1243">Idle / Check Manual</td> <td data-bbox="1052 1207 1151 1243">1</td> <td data-bbox="1211 1207 1398 1243">New Requests</td> </tr> <tr> <td data-bbox="829 1253 1052 1289">Pending</td> <td data-bbox="1052 1253 1151 1289">7</td> <td data-bbox="1211 1253 1398 1289">New Requests Ex</td> </tr> <tr> <td data-bbox="829 1299 1052 1335">Pending > 4 days</td> <td data-bbox="1052 1299 1151 1335">7</td> <td data-bbox="1211 1299 1398 1335"></td> </tr> <tr> <td data-bbox="829 1346 1052 1381">Pending > 2 weeks</td> <td data-bbox="1052 1346 1151 1381">7</td> <td data-bbox="1211 1346 1398 1381">Will Supply</td> </tr> <tr> <td data-bbox="829 1392 1052 1428">Terminated</td> <td data-bbox="1052 1392 1151 1428">0</td> <td data-bbox="1211 1392 1398 1428"></td> </tr> <tr> <td data-bbox="829 1438 1052 1474">End of lender string</td> <td data-bbox="1052 1438 1151 1474">0</td> <td data-bbox="1211 1438 1398 1474">Conditional</td> </tr> <tr> <td data-bbox="829 1484 1052 1520">Conditional</td> <td data-bbox="1052 1484 1151 1520">0</td> <td data-bbox="1211 1484 1398 1520">Cancel Requested</td> </tr> <tr> <td data-bbox="829 1530 1052 1566">Cancel Pending</td> <td data-bbox="1052 1530 1151 1566">3</td> <td data-bbox="1211 1530 1398 1566"></td> </tr> <tr> <td data-bbox="829 1577 1052 1612">Messages</td> <td data-bbox="1052 1577 1151 1612">0</td> <td data-bbox="1211 1577 1398 1612">Messages</td> </tr> <tr> <td data-bbox="829 1623 1052 1659">Staff Review</td> <td data-bbox="1052 1623 1151 1659">0</td> <td data-bbox="1211 1623 1398 1659">Staff Review</td> </tr> </tbody> </table>	Borrower		Lender	Category	Count	Category	Idle / Check Manual	1	New Requests	Pending	7	New Requests Ex	Pending > 4 days	7		Pending > 2 weeks	7	Will Supply	Terminated	0		End of lender string	0	Conditional	Conditional	0	Cancel Requested	Cancel Pending	3		Messages	0	Messages	Staff Review	0	Staff Review
Borrower		Lender																																			
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Conditional	0	Cancel Requested																																			
Cancel Pending	3																																				
Messages	0	Messages																																			
Staff Review	0	Staff Review																																			

Term	Definition
Workflow	A series of connected steps describing a repeatable sequence of interconnected actions that accomplishes a specific result. Examples: Checking an item out of a library; requesting to borrow an item from another library.
WorldCat	A database of tens of millions of online records built from the bibliographic and ownership records of contributing libraries. The WorldCat database is the largest and most comprehensive of its kind. OCLC members use WorldCat for a full array of technical library services, including cataloging, interlibrary loan, reference, union listing, local holdings, and many more.
WorldCat Local	An OCLC service that interoperates with existing locally maintained services to provide high-level Web visibility for a library's collection. It uses the WorldCat.org interface to provide Web access to WorldCat and enables cooperative, Web-scale library management.
WorldCat Navigator	An OCLC service that provides seamless resource sharing within a library consortium. The service manages returnable and nonreturnable items, and integrates with internal circulation systems and the wider OCLC resource sharing network to create a discovery-to-delivery consortial borrowing service.
WorldCat Resource Sharing	Service that helps OCLC libraries borrow and lend materials through interlibrary loan. Facilitates creating, sending, managing and tracking loan requests and document orders.
WorldCat.org	OCLC service that allows users to access WorldCat through a search box that can be included in a variety of web sites. Users can then find the items in a library near them or buy them directly.
Z39.50	A client-server protocol for searching and retrieving information from remote computer databases. Z39.50 is widely used in library environments and is often incorporated into integrated library systems and personal bibliographic reference software. Interlibrary catalog searches on behalf of interlibrary loans are often implemented with Z39.50 queries.

Addendum

The following terms are not currently used in the context of Navigator or the Navigator Request Engine. However, they are listed here along with links to any applicable NRE terms in case you should encounter them.

Please send any suggestions for additional obsolete or alternate terms that NRE users might encounter to: doc@oclc.org

- Circulation Gateway. See [circulation interoperability](#).
- Pick slip. See [picklist](#).
- RML
- Rota. See [lender string](#).
- Unified Patron Category