# Navigator Quick Reference: The Borrower Work Queue

## The Work Queue

The NRE (Navigator Request Engine) Work Queue is the main area for processing requests. When you log on to Navigator, it is normally the first screen you see. It is divided into Borrower and Lender request categories:

Standard | Advanced | Results | Bulk Action | Create | Batch Update | Saved Searches
Work Queue | Work Queue Edit

### Work Queue

| Borrower | | | Lender | |
|---|---|---|---|---|
| **Category** | **Count** | | **Category** | **Count** |
| Idle / Check Manual | 1 | | New Requests | 4 |
| Pending | 7 | | New Requests Expiring Today | 0 |
| Pending > 4 days | 7 | | | |
| Pending > 2 weeks | 7 | | Will Supply | 0 |
| | | | | |
| Terminated | 0 | | | |
| End of lender string | 0 | | Conditional | 0 |
| Conditional | 0 | | Cancel Requested | 0 |
| Cancel Pending | 3 | | | |
| | | | | |
| Messages | 0 | | Messages | 0 |
| Staff Review | 0 | | Staff Review | 0 |
| | | | | |
| Shipped | 1 | | Shipped | 3 |
| Shipped > 1 week | 1 | | Returned | 1 |
| Shipped > 2 weeks | 1 | | | |
| Received | 0 | | | |

| | | | | |
|---|---|---|---|---|
| Renew Pending | 1 | Overdue Today | | 3 |
| | | Overdue | | 0 |
| Overdue | 0 | Overdue > 4 weeks | | 0 |
| Recalled | 1 | | | |
| Returned | 4 | | | |
| **Reports** | | **Reports** | | |
| Received List | 0 | Pick List | | 0 |
| Returned List | 1 | Shipping List | | 0 |

## The Borrower Work Queue

In this quick reference, we will focus on the Borrower Work Queue.  The Lender Work Queue is covered in a separate quick reference.  The Borrower Work Queue shows all of your current requests as a Borrower through your Navigator consortium.

The request categories on the Borrower Work Queue can be customized somewhat, depending on the needs of your consortium.  But the categories shown above are the standard ones that most Navigator subscribers will see.  As you and Borrowers from your consortium take action on requests, the status of the various categories (as reflected in the Count column) will change.  When an action is taken on a request and it moves to a different category, the Work Queue is automatically updated to reflect the change.

## Borrower Work Queue Categories

As a Navigator subscriber, you should check the Work Queue periodically for requests that require staff intervention.  Requests that usually require staff intervention are:

- Idle/Check Manual
- Pending>2 weeks old
- End of Lender String
- Conditional
- Staff Review
- Overdue
- Recalled

The following table describes each of the major Borrower Work Queue categories and the actions commonly required for each.

| Category | Action |
|---|---|
| **Idle/Check Manual** | These are requests which need staff intervention before they can be sent out to the first responder. Common reasons for the Check Manual authorization status are:<br><br>• Request is a duplicate.<br>• No consortium locations could be found.<br>• The item is held locally. |
| **Pending** | Requests that have been sent to potential Lenders. |
| **Pending>4 days** | Requests that have been sent to potential Lenders without being fulfilled after 4 days. |
| **Pending>2 weeks old** | Requests that have been sent to potential Lenders without being fulfilled after 2 weeks. You should check these requests to see why they are taking so long to complete. |
| **Terminated** | Requests that have been cancelled by the patron, or terminated by staff because the item is no longer needed. |
| **End of lender string** | These are requests which remain unfulfilled after having been sent to every library in the lender string. When a request reaches the end of the lender string, you can either add group locations to the lender string or complete the request. If your location has been configured to automatically complete requests that have reached this stage, you will not see requests under this category. Similarly, if your location is configured to send requests directly to ILLiad or WorldCat Resource Sharing if unfulfilled in the group, you will not see requests under this category. |
| **Conditional** | Requests for which the potential Lender has asked the borrowing library to agree to certain conditions before supplying the item. You should respond to the potential Lender library and let them know whether you can meet their conditions. |
| **Cancel Pending** | Requests waiting for the current Lender to approve their cancellation before they can be terminated. |
| **Messages** | Notes sent from the current Lender to the Borrower. You should check any messages in the Borrower Work Queue. A request will be included in the Messages category when the Lender has sent a message that does not update the request status. |

| | |
|---|---|
| **Staff Review** | Requests that have encountered an error of some sort during processing and require staff review.  The error may be in the NRE request process or in the circulation integration process.  These require staff intervention in order to progress further in the workflow.  Frequently, these are items for which the circulation integration has failed. |
| **Shipped** | Items that have been sent from Lender to Borrower. |
| **Shipped>1 week** | Items which have been shipped by the Lender to the Borrower but have not yet been received by the borrowing library after 1 week. |
| **Shipped>2 weeks** | Items which have been shipped by the Lender to the Borrower but have not yet been received by the borrowing library after 2 weeks. |
| **Received** | Items that have been received by the borrowing library. |
| **Renew Pending** | Items for which the borrowing library has requested a renewal but has not yet received a response. |
| **Overdue** | This category represents items on loan to your library that are past their due date for return.  These items should be returned or renewed as soon as possible. |
| **Recalled** | This category represents items on loan to your library that have been recalled by the lending library.  These should be returned as soon as possible. |
| **Returned** | Items that the borrowing library has returned to the lending library but have not yet been checked in by the Lender. |

## Using the Borrower Work Queue

### Click on the Numbers

To see a list of the requests in any category on the Borrower Work Queue, click on the number in the Count column.  For example, in the Borrower Work Queue shown below, the *Cancel Pending* category has 3 requests.  That means there are 3 requests to borrow library items that have been cancelled by the Borrower (your library) before the items were shipped.

## Work Queue

| Borrower | |
|---|---|
| **Category** | **Count** |
| Idle / Check Manual | 1 |
| Pending | 7 |
| Pending > 4 days | 7 |
| Pending > 2 weeks | 7 |
| | |
| Terminated | 0 |
| End of lender string | 0 |
| Conditional | 0 |
| Cancel Pending | 3 |
| | |
| Messages | 0 |
| Staff Review | 0 |
| | |
| Shipped | 1 |
| Shipped > 1 week | 1 |
| Shipped > 2 weeks | 1 |
| Received | 0 |

Clicking on the number 3 in the *Cancel Pending* category (above) produces the following list of requests (commonly called a *hitlist*):

**Borrower Results**

Number of Results: **3**

Bulk Action: ☑ Select all  ⬜ Deselect all  ⬚ Clear all  **Bulk Action**

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

☐ 2086 : 2087 *** Train 1-01 : Train 1-02

**Moby-Dick** - Ishmael's mighty book

McSweeney, Kerry, 1941- | ISBN: 080577954X (alk. paper);9780805779547 (alk. paper);0805780025 (pbk.);9780805780024 (pbk.)

**Request No Longer Required**

*Status:* **Cancel Pending:**   *Authorisation:* **Processed**   *Last Action:* **Cancel: 23 Dec 2009**   *Lender string:* **1** of **2**

Add Private Note ⌄  Action  📄 Details

☐ 1408 : 2073 *** Train 1-01 : Train 1-02

**The interpretation of early music.**

Donington, Robert

**Request No Longer Required**

*Status:* **Cancel Pending:**   *Authorisation:* **Processed**   *Last Action:* **Cancel: 11 Nov 2009**   *Lender string:* **1** of **2**

Add Private Note ⌄  Action  📄 Details

☐ 1407 : 2074 *** Train 1-01 : Train 1-02

**Rethinking regional innovation and change path dependency or**

Fuchs, Gerhard | ISBN: 9780387230023

**Request No Longer Required**

## Take Action on the Hitlist

There are a number of actions you can take on a hitlist like the one shown above.

**Take action on an individual request.**  Each request has a drop-down menu of possible actions. (See below.)  The drop-down menu of actions varies, depending on the status of the request.  The requests in the hitlist above all have the status of *Cancel Pending*, so the list of available actions for these requests looks like the following:
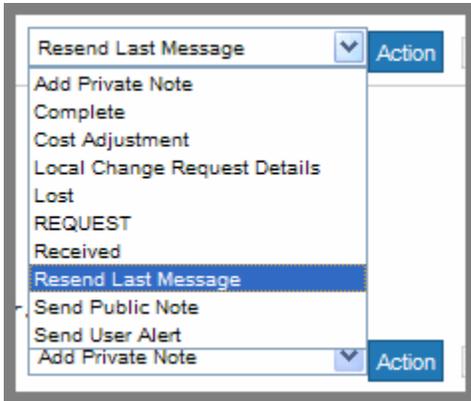
Selecting any of the available actions for the request (e.g., *Resend Last Message*) and then clicking the [Action] button will initiate that action for the request.


## Take Action on Multiple Requests

**Bulk Action.** The Bulk Action option is the best way to handle multiple requests at once in NRE. Let's say, for example, that for all of the requests in the above hitlist you want to resend the last message to cancel the loans.   To do this, click the check box for each transaction, select *Resend Last Message* in the drop-down menu for each transaction, and click the [Bulk Action] button.  (see next page)

Number of Results: **3**

Bulk Action: ☑ Select all  ☐ Deselect all  ⬜ Clear all  **Bulk Action**

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

☑ 2086 : 2087 *** Train 1-01 : Train 1-02

**Moby-Dick** - Ishmael's mighty book

McSweeney, Kerry, 1941- | ISBN: 080577954X (alk. paper);9780805779547 (alk. paper);0805780025 (pbk.);9780805780024 (pbk.)

**Request No Longer Required**

*Status:* **Cancel Pending:**  *Authorisation:* **Processed**  *Last Action:* **Add Private Note: 12 Apr 2010**  *Lender string:* **1** of **2**

Resend Last Message ▼  Action

☑ 1408 : 2073 *** Train 1-01 : Train 1-02

**The interpretation of early music.**

Donington, Robert

**Request No Longer Required**

*Status:* **Cancel Pending:**  *Authorisation:* **Processed**  *Last Action:* **Cancel: 11 Nov 2009**  *Lender string:* **1** of **2**

Resend Last Message ▼  Action

☑ 1407 : 2074 *** Train 1-01 : Train 1-02

**Rethinking regional innovation and change path dependency or**

Fuchs, Gerhard | ISBN: 9780387230023

**Request No Longer Required**

*Status:* **Cancel Pending:**  *Authorisation:* **Processed**  *Last Action:* **Cancel: 13 Nov 2009**  *Lender string:* **1** of **2**

Resend Last Message ▼  Action

When you click the **Bulk Action** button, the following screen displays.  Notice that the Request IDs in the following screen correspond to the Request IDs of the requests involved in the Bulk Action. Click the Action button to initiate the Bulk Action:

## Bulk Action / Authorisation

**Request IDs**

Enter Request IDs, separated by blanks or commas

1407, 1408, 2086

Select action for all the requests

**Action**  Resend Last Message

**Action**  Reset Form
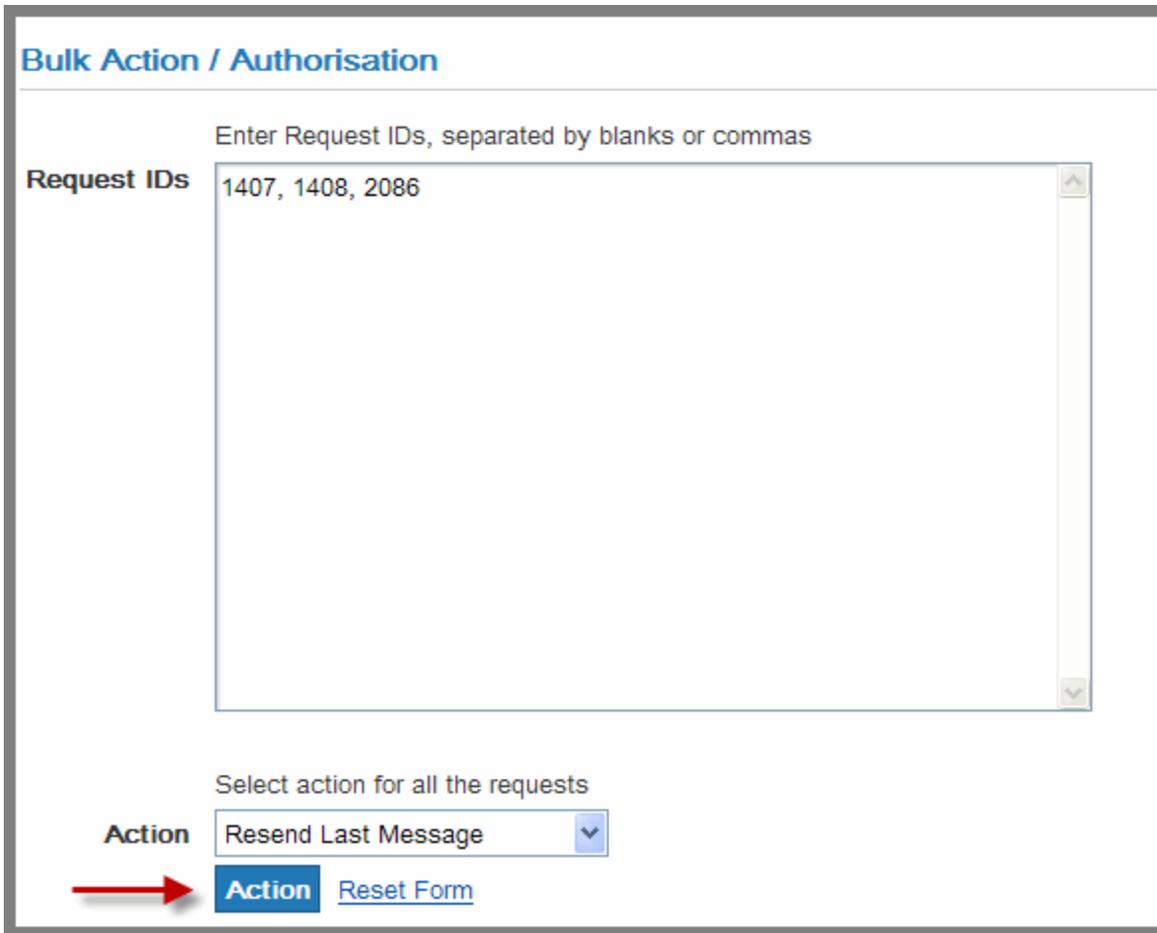
**Batch Update.**  Batch Update is the quickest method of handling multiple iterations of the same transaction.  It is also a preferred method of doing many common NRE transactions on an individual basis.  Batch Update is always available from the top of the NRE interface screen:

**NRE**

Standard | Advanced | Results | Bulk Action | Create | Batch Update | Saved Searches
Work Queue | Work Queue Edit

### Work Queue

Search
Requests
Work Queue
User
Locations
Reports
Logout
Help

**User ID**
**TRAIN11**

| Borrower | | Lender | |
|---|---|---|---|
| **Category** | **Count** | **Category** | **Count** |
| Idle / Check Manual | 1 | New Requests | 3 |
| Pending | 7 | New Requests Expiring Today | 0 |
| Pending > 4 days | 7 | | |
| Pending > 2 weeks | 7 | Will Supply | 0 |
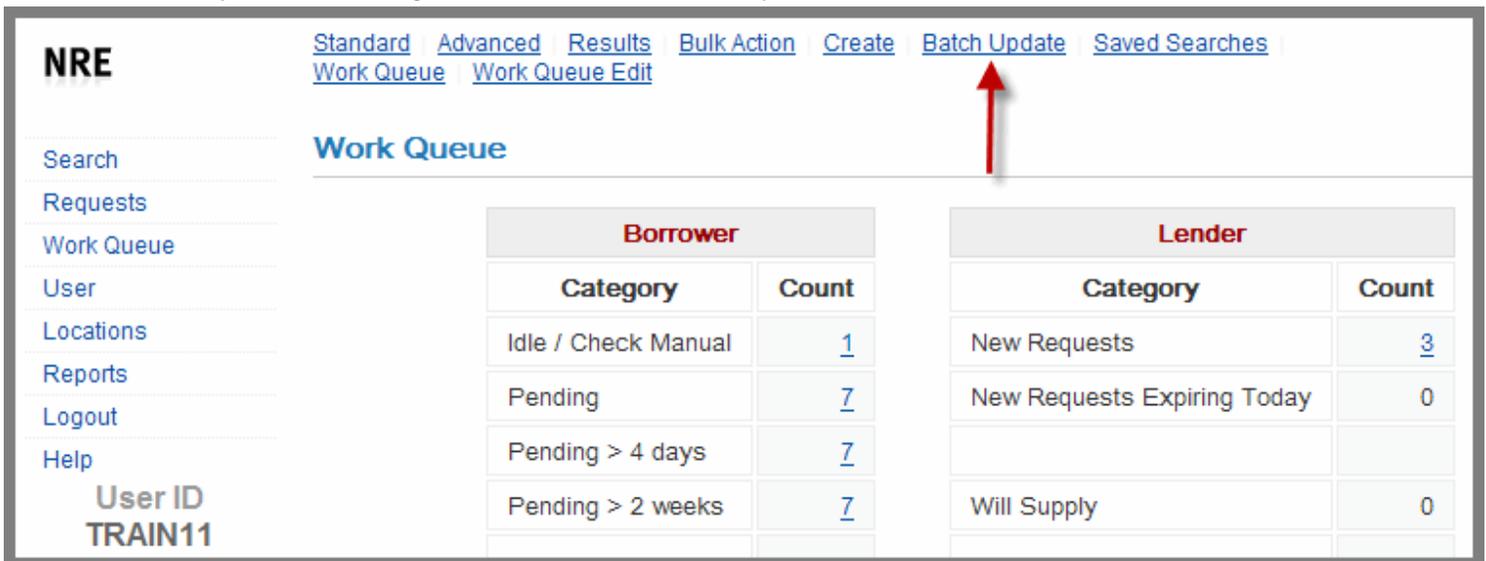
For more information on using Batch Update in NRE, please refer to any of the following Navigator quick references:

- **Navigator Quick Reference: Shipping (http://www.oclc.org/us/en/support/documentation/navigator/using/NavigatorQuickReferenceShipping.pdf** )
- **Navigator Quick Reference: Receiving (http://www.oclc.org/us/en/support/documentation/navigator/using/NavigatorQuickReferenceReceiving.pdf** )
- **Navigator Quick Reference: Returning (http://www.oclc.org/us/en/support/documentation/navigator/using/NavigatorQuickReferenceReturning.pdf** )
- **Navigator Quick Reference: Checking In (http://www.oclc.org/us/en/support/documentation/navigator/using/NavigatorQuickReferenceCheckingIn.pdf** )

## Get Details About an Individual Request

Each request on a hitlist has a **Details** link:
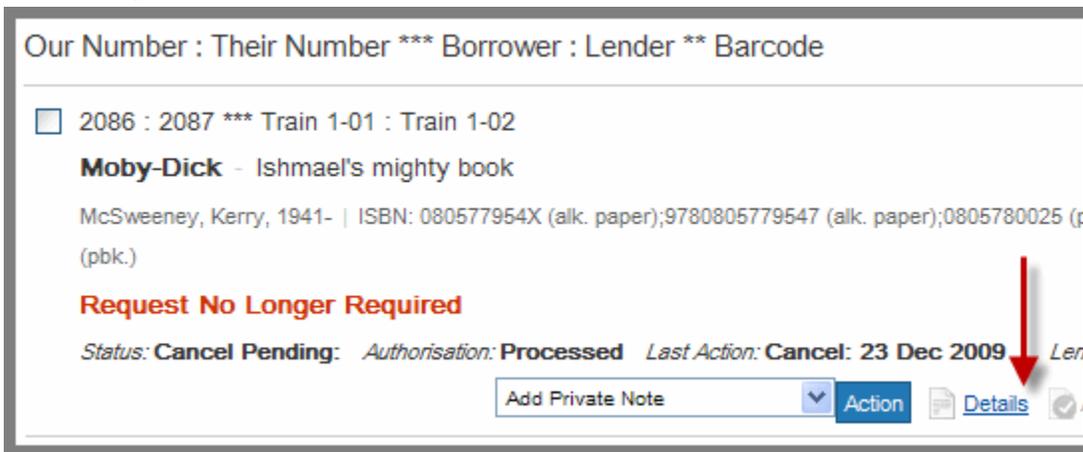


Clicking on the **Details** link produces an extensive list of information about the request. For example, clicking the Details link for the request shown above provides the following information about the request. Because the detailed information is so extensive, it is shown in the following 3 screen captures. In your NRE interface you will see this information in one continuous flow.

## Request Details

Actions available: Add Private Note ▾ **Action** ‹ Pre

### Request Details

**Request ID**

| | |
|---|---|
| **Our Number** | 2086 |
| **Their Number** | 2087 |
| **Item Format** | Book |

| | |
|---|---|
| **Status** | Cancel Pending |
| **Authorisation Status** | Processed |

### Service Details

| | Service 1 | | Service 2 |
|---|---|---|---|
| Service Type | Loan | Service Type | None |
| Media Type | Printed | Media Type | None |

### Item Details (Monograph)

| | |
|---|---|
| **Title** | Moby-Dick |
| **Subtitle** | Ishmael's mighty book |
| **Author** | McSweeney, Kerry, 1941- |
| **Series Title & Numbering** | Twayne's masterwork studies ; no. 3 |
| **Sponsoring Body** | |
| **Publisher** | Twayne Publishers |
| **Place of Publication** | Boston |

| | |
|---|---|
| Publisher | Mayne Publishers |
| Place of Publication | Boston |
| Date | c1986. |
| Edition | |
| Item Description | xii, 131 p. : port. ; 23 cm. |
| ISBN | 080577954X (alk. paper);9780805779547 (alk. paper);0805780025 (pbk.);9780805780024 (pbk.) |
| UPC | |
| Classmark | |
| Call Number | |
| Volume / Issue | |

**Control Numbers**

| | |
|---|---|
| Library of Congress | 86004839 |
| OCLC | 13358012 |

| | |
|---|---|
| Additional Nos | LCN: 86004839 |
| Ref. Source | WorldCat/worldcat |

**Patron Details**

| | |
|---|---|
| Name | Staff Train 1-01 |
| User ID | TRAIN11 |
| Patron ID | 87 |
| Patron Status | SYSAD |

**Additional Service Details**

| | |
|---|---|
| Requested By | Library District 101 |
| Service Level | Normal - Local Search |
| Entry Date | 23 Dec 2009 14:30 |

| | | |
|---|---|---|
| **Entry Date** | 23 Dec 2009 14:30 | |
| **Need by Date** | 22 Jan 2010 | |

**Delivery Details**

| | |
|---|---|
| **Delivery Method** | Postal Delivery |

Send To

1 1Train1

Train11

T11

11011

| | |
|---|---|
| **Telephone No** | 999 999-1001 |
| **Fax No** | 999 101-9999 |

**Pickup Location**   Library District 101

**Lender String Details**

| Seq | Location | Status |
|---|---|---|
| 1 | Library District 102 | |
| 2 | Library District 103 | |

**History**

| Lender | Action | Status | Date Changed |
|---|---|---|---|
| Library District 102 | Cancel | Cancel Pending | 23 Dec 2009 14:47:5 |
| Library District 102 | Terminate Request | Pending | 23 Dec 2009 14:47:4 |
| Library District 102 | REQUEST | Pending | 23 Dec 2009 14:30:5 |

Actions available: Add Private Note [ **Action** ]   ‹ Pre

## Some Common Borrower Functions

### Terminating a Request

You can terminate a request as long as the item has not yet been received.  Terminating a request cancels the request with the current responder and does not forward the request to the next location.

To terminate a request, retrieve the item to be terminated from a Request Search or the Work Queue and display the brief details.  Select Terminate Request from the drop-down menu and click the Action button.



When you click the Action button, the Terminate Request screen displays.  You can use this screen to include a note to the Lender (e.g., "Item no longer needed") before clicking the   button.
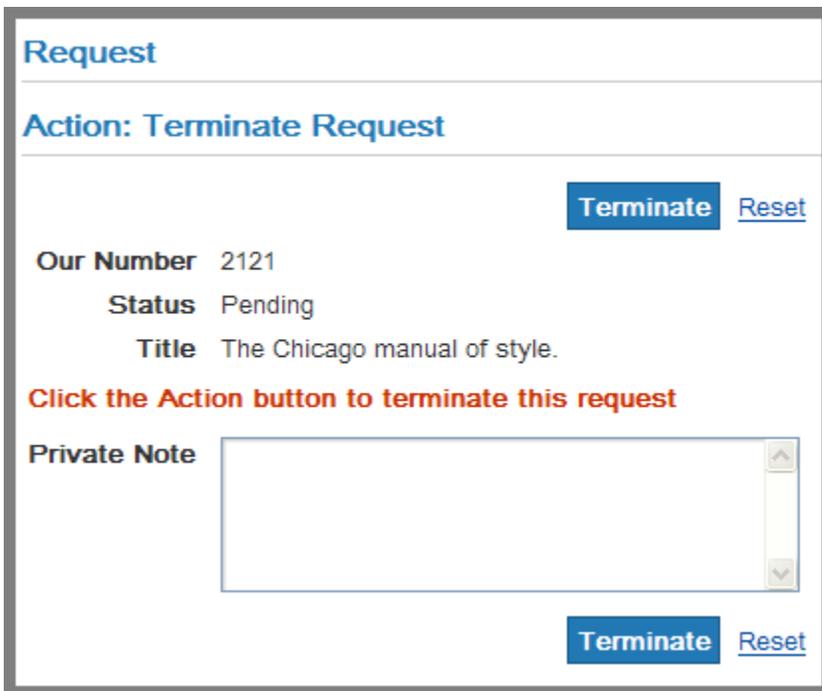


Once you click Terminate, a cancellation message will be sent to the current Lender.  The request termination will not be complete until the cancellation process at the Lender's site is complete. While waiting for confirmation of the cancellation, the request will be in *Cancel Pending* status.

| Conditional | 0 |
| Cancel Pending | 2 |

14

## Completing a Request

Requests which should not be progressed any further can be removed from the Borrower Work Queue by performing the *Complete* action.  Some types of requests that can be completed are:

- An Idle request that can be supplied locally
- An Idle request that duplicates an active request for the same title from the same patron
- Any request that you are certain has reached the end of its lifecycle

You should not Complete requests if they are at a status of *Pending*, since the lending library may still supply the item.  Requests should only be Completed if you are sure no further action will be taken on them.

Complete requests by selecting the *Complete* action from the list of available actions:



When the Complete screen displays, add a private note if needed and click the **Complete** button (see next page).

**Note:**  The *Complete* action does not send a message of any kind to the other party (in this case, the Lender).  The *Complete* action only completes your copy of the transaction.

## Renewing a Requested Item

To renew the loan on a borrowed item, retrieve the request (either through the Work Queue or via a Request Search) and perform the *Renew* action:

Once you click the [Action] button, the next screen enables you to enter a new Desired Due Date before clicking the [Renew] button:



The request will appear in the Renew Pending section of the Borrower Work Queue:



A message will be sent to the lending library that a renewal has been requested.  If the Lender agrees to the renewal, the request will return to the Received section of the Borrower Work Queue with a new Due Date.

## Cancelling a Request

The *Cancel* action should **only** be used to cancel a request with the current responder location and move the request on to the next location in the lender string.  Use the *Terminate Request* action to cancel the entire request.

The Cancel action:



Once you click the [Action] button, the resulting screen enables you to send a message to the current responder with information about the cancellation:



When you are ready to cancel the transaction with the current responder, click the [Cancel] button.

The request will then move from a status of Pending to one of Cancel Pending, waiting for the lending library to acknowledge the cancellation.

When the cancellation is acknowledged by the Lender, the request will move on to the next location in the lender string and become *Pending*. If there are no more locations on the lender string, the request will be sent to your ILL system or to Iliad or WorldCat Resource Sharing.

## Navigator Questionnaires and Support Material

The Borrowing 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/support/documentation/navigator/prepare/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.

## 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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