



Navigator Quick Reference: Creating Requests on Behalf of a Patron

Occasionally, you may need to create a request on behalf of a patron. This is done by finding the bibliographic item from an NRE search of WorldCat and creating the request from that bibliographic item.

What you need before you begin

- Your Navigator Request Engine (NRE) staff User ID and Password
- Patron’s barcode or library card number
- Information about the book or other item to request, such as:
 - Author
 - Title
 - ISBN
 - OCLC number of the WorldCat record describing the item

Note: You may want to find the OCLC number of the item you need in the public catalog.

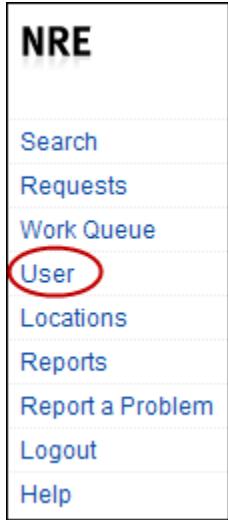
Summary steps

Step	Action
1	Log in to your NRE staff interface (for example, https://texas.vdxhost.com/nre), using your NRE staff User ID and Password.
2	Search for a user by following the steps under Searching for a user record .
3	If you do not find the user, create a user record by following the steps under Creating a user record .
4	Conduct a search using Advanced Search : <ul style="list-style-type: none"> • Choose the relevant search field from the drop-down list. • Type search terms. • Click Search.
5	Find the needed item in the results: <ul style="list-style-type: none"> • Your search terms appear at the top of the results. • Items found by the search are listed.

Searching for a user record

To see if the user is already in NRE, you can do a user search.

Click the **User** button in the left navigation menu to display the User Search screen.



You may search for a user by the:

- User ID Category
- E-mail address
- Last Name

User Search

Search User ID ▼

for

Match Exact Any part First part Last part

After entering your search term, specify how you want NRE to match the term.

Because of the use of the prefix in the user ID, you should select **Any part**.

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User records matching your search will display:

Results Page 1 of 1

SAP01
Staff San Antonio Public Library
[Details](#) [Edit](#) [Expire](#)

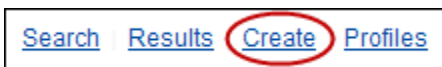
334-PATRON025
Patron San Antonio Public Library
[Details](#) [Edit](#) [Expire](#)

If you are creating a request on behalf of a user and the user record already exists, note the User ID. You will use it to associate the request with the patron.

If the user you are searching for is not listed, you should create a new user record.

Creating a user record

You can create a new user record by clicking the **Create** link from the top menu bar when viewing the User Search screen:



A blank screen will display:

User Details

[Save](#) [Cancel](#)

User ID

Password Update Password

Confirm Password

First Name

Last Name

E-Mail

Category

Join Date (e.g. 1 Sep 2003)

User Expiration Date (e.g. 1 Sep 2003)

Location

Banned In NRE

Has Presigned Copyright

Default Pickup Location

Note/Stat 1

Note/Stat 2

Note/Stat 3

Enter as much information as you need to be able to identify this user for requesting.

Field	Description
User ID*	The User ID by which the user will log in to make requests in Navigator or view My Requests. Note: The barcode must be preceded by the prefix given to you by your system administrators, followed by a hyphen (-). For example: <div style="text-align: center;"> 550-907511 ↑ Prefix ↑ Patron number </div>
Password	Your patron will not log in to with these credentials, therefore, a password is not needed.
First Name	The first name of the user.
Last Name*	The last name of the user.
E-mail	The user's e-mail address. This will be used for user notification.
Category*	The user type.
Join Date	Will default to the current date.
User Expiration Date	The date at which the user will no longer be valid. Usually not set when creating a user.
Location*	The location the user is affiliated with. You may only be presented with your location as an option.
Banned in NRE	A Yes/No field indicating if the user is prevented from making requests.
Has Presigned Copyright	Not used in North America.
Default Pickup Location	Unless another value is selected, the location where the patron picks up the item.
Note/Stat 1-10	Free text fields for adding user information not already added previously.

Note: Required fields are marked with an asterisk (*).

When you have created the user record, click **Save**.

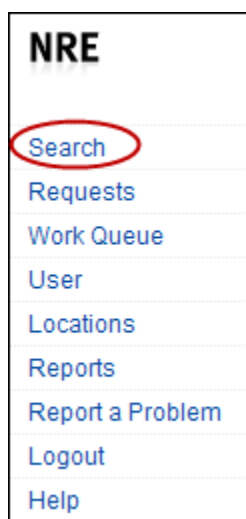
It is important to use the same barcode or ID with which the patron will authenticate himself. He will then be able to view and manage his requests whether he created them himself in Navigator or they were created on his behalf by a staff member in NRE.

If you create a user record using the ID that the patron will use when he first authenticates in Navigator, the details of the user record will be updated when the patron authenticates in Navigator using EZproxy.

Searching WorldCat through NRE

To search WorldCat, NRE uses Z39.50, an international industry standard that specifies a structure for searching and retrieving information from remote databases. This searches WorldCat on the FirstSearch platform.

To begin a search, click the **Search** button in the left navigation menu.



Advanced search

Advanced Search is the best search for finding a specific bibliographic item. You can access the Advanced search from the **Advanced** link from the top menu bar:



Advanced Search allows you to search a selected field, for example, Title, Author, ISBN. You can combine search terms using Boolean operators – AND, OR and AND NOT.

The 'Advanced Search' form includes a 'Search' button and a 'Reset Form' link. Below the buttons, it instructs the user to choose a field name and a search term, and to use AND, OR, and AND NOT operators. The form contains three rows for input: Title, Author, and ISBN, each with a dropdown for the field, a text box for the search term, and a dropdown for the operator (set to 'and'). A 'Records per page' dropdown is set to 10.

1. Choose the relevant search field from the drop-down list.

The 'Advanced Search' form with the 'Field' dropdown menu open. The menu lists options: Title (selected), Author, Subject Heading, Publisher, Date, Abstract, Any, ISBN, ISSN, and Anywhere. The search term boxes are empty. The 'Records per page' dropdown is set to 10.

2. Type search terms. If you want the search term as a phrase, enclose it in quotation marks.

The 'Advanced Search' form with search terms entered. The 'Title' field is set to 'black holes' and the 'Author' field is set to 'Shipman'. Both are followed by 'and' operators. The 'ISBN' field is empty. The 'Records per page' dropdown is set to 10.

Note: You can choose how many records are displayed on each results page by amending the **Records per page** field.

3. Click the **Search** to perform the search.

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From Advanced Search, you may set filters on the type of material that NRE should return in the results list. However, it is better to filter your results after they have been retrieved from an initial search because the filters affect the performance of the search.

Filter results by:

[Format\(s\)](#)

- Article Printed
- Print Journal
- Book
- Part of Book
- Ejournal
- Article Online
- Music CD
- DVD Movie
- Book on Tape
- Book on CD
- Patent
- Thesis
- Report
- Large Print Book
- Braille Book
- Computer File
- CD-ROM
- OTHER

[Select all](#) [Clear all](#)

[Language\(s\)](#)

- English
- French
- German
- Italian
- Spanish

[Select all](#) [Clear all](#)

[Level\(s\)](#)

- Adult
- General
- Juvenile

[Select all](#) [Clear all](#)

To display or hide the filter options, click the filter name link:

Filter results by:

[Format\(s\)](#)

[Language\(s\)](#)

- English
- French
- German
- Italian
- Spanish

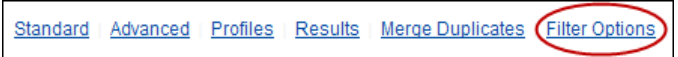
[Select all](#) [Clear all](#)

[Level\(s\)](#)

The following filter options are available:

- **Format(s):** Select one or more item formats from the list. NRE will limit your results to the format(s) you selected. If you want to select all formats, use the **Select all** option.
- **Language(s):** Select one or more languages from the list. NRE will limit your results to works in the language(s) you selected. If you want to see all languages, use the **Select all** option.
- **Level(s):** Select one or more levels from the list. NRE will limit your results to works intended for the audience(s) you selected. If you want to see all levels, use the **Select all** option.

NRE will perform the search and filter the results before displaying them. Because this may take some time, it is preferable to use the **Filter Options** in the top menu *after* the search results have been displayed:



Note: The same filter options are available. Click **Submit** to filter the search results.

Search results

The Results List

Once the search results are retrieved, a brief record for each item is displayed. The results display shows brief bibliographic information and the number of holdings represented by the bibliographic record.

Results

You searched for **Any Equal Phrase "black holes"** in [WorldCat](#)

Result pages: 1 2 3 >

- A brief history of time : from the big bang to black holes / Stephen W. Hawking ; introduction by Carl Sagan ; illustrations by Ron Miller.**

Toronto ; New York : Bantam Books, 1988.

Number of holdings: 127 (AALS 3, BCLSS HALSS 1, BCLSS WCRSTX 1, CTLSS 3, HALSS 4, NETLS 1, NTRLS 7, TPLSS 1, TTPLS 1, WCRSTX 83, WTLSS 1) | ISBN - 0563052438 9780563052436 056305340X 9780563053401 | LCCN - 87033333

Collection: WorldCat
- The universe in a nutshell / Stephen Hawking.**

New York : Bantam Books, c2001.

Number of holdings: 117 (AALS 2, BCLSS HALSS 1, BCLSS WCRSTX 1, CTLSS 2, HALSS 5, NETLS 2, NTRLS 7, TPLSS 1, TTPLS 1, WCRSTX 78, WTLSS 1) | ISBN - 056380202X 9780563802023 | LCCN - 2001035757

Collection: WorldCat
- Black holes and baby universes and other essays / Stephen Hawking.**

New York, N.Y. : Bantam Books, c1993.

Number of holdings: 79 (BCLSS HALSS 1, BCLSS WCRSTX 1, CTLSS 1, HALSS 4, NTRLS 1, TPLSS 1, TTPLS 2, WCRSTX 65, WTLSS 1) | ISBN - 0563095234 9780563095234 | LCCN - 93008269

Collection: WorldCat

Note: NRE automatically displays an initial set of 20 hits. Further results can be displayed, if required, by clicking on further page numbers.

Sorting the Results

Once search results have been displayed, it is possible to sort them by Author, Date of publication or Title. You can do this by clicking the **Sort Results** link in the top menu bar:

[Filter Options](#) [Sort Results](#) [Status](#) [History](#) [Saved List](#) [Searches](#) [Create Request](#)

You can sort the results using various sort options. Specify the number of results to sort.

Sort Results

Sort by:

Sort Order:

Records to sort (max 1000):

Sort

Results

You searched for **Any Equal Phrase "black holes"** in [WorldCat](#)

Result pages: 1 2 3 4 >

- 13 : thirteen stories that capture the agony and ecstasy of being thirteen / edited by James Howe.**

New York : Atheneum Books for Young Readers, c2003.

Number of holdings: 84 (AALS 1, CTLSS 2, HALSS 1, NETLS 2, TPLSS 1, WCRSTX 22) | ISBN - 0689828632 9780689828638 | LCCN - 2003012802

Collection: WorldCat
- About time : Einstein's unfinished revolution / Paul Davies.**

New York : Simon & Schuster, c1995.

Number of holdings: 46 (AALS 1, BCLSS WCRSTX 1, CTLSS 1, NTRLS 1, TPLSS 1, WCRSTX 34, WTLSS 1) | ISBN - 0671799649 9780671799649 | LCCN - 94040281

Collection: WorldCat
- Astronomy encyclopedia / foreword by Leif J. Robinson ; star maps created by Wil Tirion ; general editor, Patrick Moore.**

New York : Oxford University Press, 2002.

Number of holdings: 48 (BCLSS HALSS 1, CTLSS 1, NETLS 1, NTRLS 1, TPLSS 1, WCRSTX 36, WTLSS 1) | ISBN - 0195218337 9780195218336 | LCCN - 2003535058

Collection: WorldCat

Bibliographic and Location details

To view the full bibliographic details of an item, click the **Details** button, or click the title link from the results list.

13 : thirteen stories that capture the agony and ecstasy of being thirteen / edited by James Howe.

New York : Atheneum Books for Young Readers, c2003.

Number of holdings: 84 (AALS 1, CTLSS 2, HALSS 1, NETLS 2, TPLSS 1, WCRSTX 22) | ISBN - 0689828632 9780689828638 | LCCN - 2003012802

Collection: WorldCat

The bibliographic details and holdings will be displayed:

Result Details

Record 1 of 13057 Collection: WorldCat

Save Request

Title: **13 : thirteen stories that capture the agony and ecstasy of being thirteen / edited by James Howe.**

Format: Book

Alternate Title: Thirteen

Also Titled: Thirteen stories that capture the agony and ecstasy of being thirteen

Edition: 1st ed.

Imprint: New York : Atheneum Books for Young Readers, c2003.

Description: 278 p. ; 22 cm.

Summary: Collects thirteen stories about moments in a teen's life, such as a first kiss and obsessing over a pair of special sneakers, by various authors, including Laura Godwin and Stephen Roos.

Notes: Accelerated Reader/Renaissance Learning MG 5.0 9.

Contents: What's the worst that could happen? / Bruce Coville -- Kate the great / Meg Cabot - If you kiss a boy / Alex Sanchez -- Thirteen and a half / Rachel Vail -- Jeremy Goldblatt is so not Moses / James Howe -- Black holes and basketball sneakers / Lori Aurelia Williams -- Picky eater / Stephen Roos -- Such foolishness / Maureen Ryan Griffin -- Noodle soup for nincompoops / Ellen Wittlinger -- Squid girl / Todd Strasser -- Angel & Aly / Ron Koertge -- Nobody stole Jason Grayson / Carolyn Mackler -- Tina the teen fairy / Ann M. Martin and Laura Godwin.

Source of Acquisition: Junior Library Guild <http://www.juniorlibraryguild.com>

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You may not see the location of the holdings. Since NRE does not recognize all of the OCLC symbols used in WorldCat, you may see the OCLC symbol in the call number field.

Location	Region	Call Number	Availability
Abilene Public Library	BCLSS WCRSTX		Circulation status undefined
		tbn	Circulation status undefined

Use the **Next** and **Previous** record links to display the bibliographic details of the next or previous item in results list.

To return to the results list, click **Results** from the top menu bar:

[Standard](#) [Advanced](#) [Profiles](#) [Results](#) [Merge Duplicates](#) [Filter Options](#) [Sort Results](#)

Requesting items found in a search

The **Request** button is available from both the results list and the Details display after a search.

Results

You searched for **Any Equal Phrase "black holes"** in [WorldCat](#)

Result pages: 1 2 3 4 >

1. **13 : thirteen stories that capture the agony and ecstasy of being thirteen / edited by James Howe.**

New York : Atheneum Books for Young Readers, c2003.

Number of holdings: 84 (AALS 1, CTLSS 2, HALSS 1, NETLS 2, TPLSS 1, WCRSTX 22) | ISBN - 0689828632 9780689828638 | LCCN - 2003012802

Collection: WorldCat

[Save](#) [Request](#) [Details](#)

Result Details

Record 1 of 13057 | Collection: WorldCat < Previous [Next](#) >

[Save](#) [Request](#)

Title **13 : thirteen stories that capture the agony and ecstasy of being thirteen / edited by James Howe.**

Format Book

Alternate Title Thirteen

Also Titled Thirteen stories that capture the agony and ecstasy of being thirteen

Edition 1st ed.

Imprint New York : Atheneum Books for Young Readers, c2003.

Click the **Request** button to display the request screen. Most requests in practice only require a small amount of data entry by the user.

Request details

Request [Request](#) [Reset](#)

Request Details

Authorisation Status To be Authorised

Item Format Book

Do not change the Authorisation Status field. It is recommended that this not be changed since other bibliographic information is specific to that particular item format.

Service details

Service Details

Service 1 Service 2

Service Type Loan Service Type

Media Type Media Type

Do not change the **Service Type**.

The **Media Type** field allows you to specify what format you would like to receive the material in, for example, printed or DVD.

Item details

Item Details (Monograph)

Title 13

Subtitle thirteen stories that capture the agony and ecstasy of being thirteen

Author Howe, James, 1946-

Series Title & Numbering

Sponsoring Body

Publisher Atheneum Books for Young Readers

Place of Publication New York

Date c2003.

Edition 1st ed.

Item Description 278 p. ; 22 cm.

ISBN 0689828632 9780689828638

UPC

Classmark

Additional Nos LCN: 2003012802

Ref. Source WorldCat/worldcat

Use Item Note to send the lender important additional item information like 'Large Print Version' or 'First Edition Only'

Item Note

Well-Known Control Numbers

Here is a list of well-known control numbers related to this record - use this dialogue to add, edit or delete the numbers in this list

52471889 [OCLC]

Library of Congress [Update](#) [Add](#) [Delete](#)

This section of the request form shows bibliographic information that is automatically pulled into the form from your search of WorldCat.

You can enter an **Item Note**, a Public note that is sent with the request for all potential suppliers in the lender string.

Lender string details

The lender string is created automatically by NRE once the request is submitted. No locations should be added to the lender string.

Notes

You can enter a **Private Note** here. This note is an internal note for the requesting library's reference.

Patron details

Enter the User ID of the user who is requesting the item. **Do not** precede the User ID with the prefix that has been given to you by OCLC when

validating a user. OCLC will add that automatically. Then click **Validate**.

NRE will validate the User ID against the NRE database. The user record must already exist in NRE before beginning the request process.

Once the User ID has been validated, the request screen will refresh and the user's information will replace the logged-in staff member's name in the **Patron Details**.

If necessary, you can enter the end-user's e-mail address, which will be used for user notification.

As long as you have used the same User ID (following the prefix) as the patron does in the WorldCat Navigator patron interface, the patron can view this request in WorldCat Navigator.

Additional service details

The only field that should be modified in this section is **Need by Date** to indicate when the item is required by the patron. The date needs to be entered in the DD MON YYYY format.

Delivery details

You should not modify this field.

If your users can pick up their requested material at more than one location, NRE will give you **Pickup Location** options. The appropriate pickup location can be selected here.

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Once all the details are correct, click the **Request** button at the bottom or top of the screen. When the request has been successfully submitted, a new request message will be displayed.

You will be informed of the request's unique number, and will be able to print request details if required.

New Request

Request Result

Your request has been successfully submitted.

The system has assigned the Request ID **5352** to the request.

Use the [Requests](#) option to track the status of this request.


Request Details

-- LOAN Request -- 04 Nov 2010 --

Request Number:	5352
Title:	13
Author:	Howe, James, 1946-
Date of publication:	c2003.

Further Information

This item is not needed after:	04 Dec 2010
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 [Print](#)

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)

Comments, suggestions, feedback

Please send us your comments about this quick reference at: doc@oclc.org

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