

Navigator Quick Reference: Returning Borrowed Items

The Basic Returning Process

Items in the **Received** category of the Borrower Work Queue are on loan to borrowers at your library. You must implement the Returned action when they are ready to be returned to the supplying library. Initiating the Returned action will send a message to the lending library that the item is being returned. Your Navigator system will be configured to use either the circulating item barcode or the Request Number to identify the request. If you have the item barcode, the Batch Update process is the quickest method. If you are using the Request Number to identify requests to be returned, you can either use Batch Update or use the functions associated with the **Work Queue** or the **Request Search**.

Batch Update

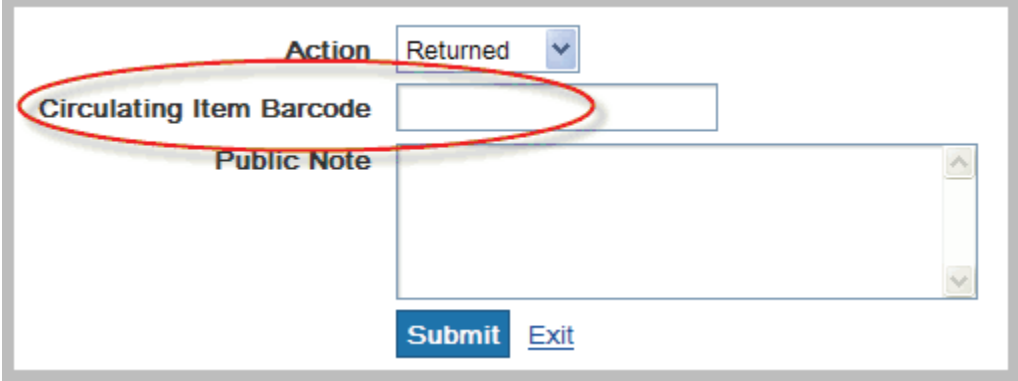
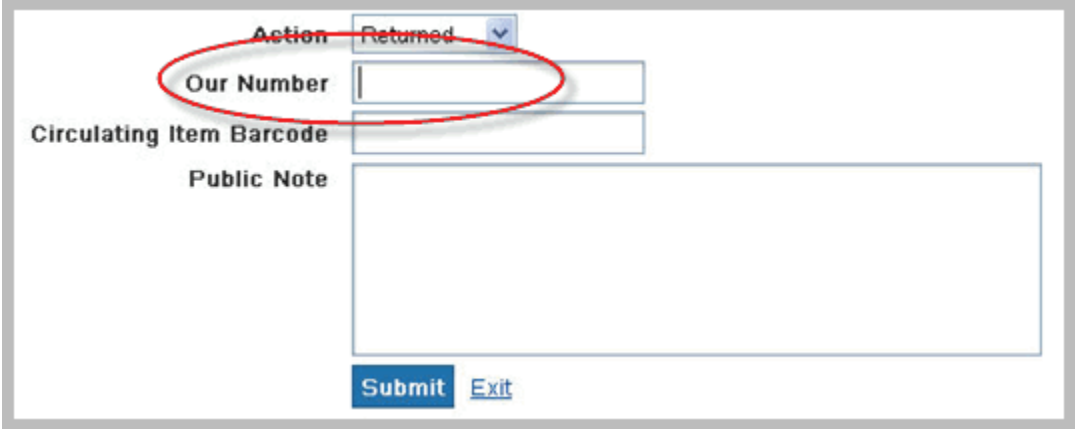
When your patron returns an item and you are ready to send it back to the Lender, you must change the status of the request to Returned in NRE. The quickest way to do this is to use the Batch Update. This is accessed from the top of the NRE interface:

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

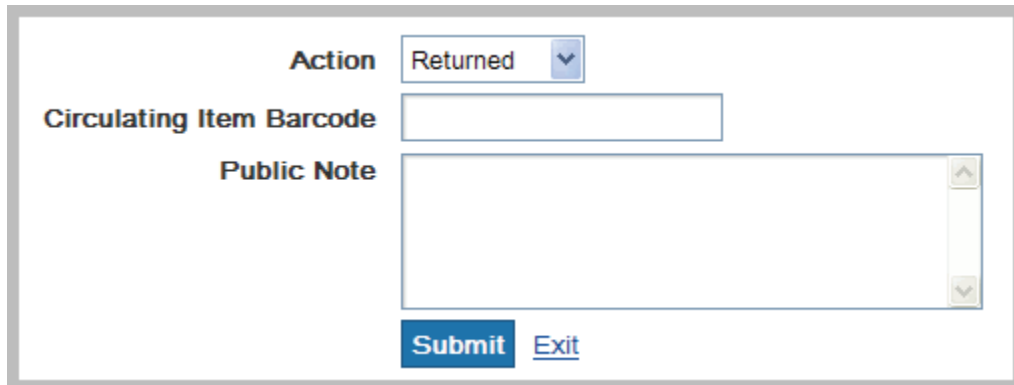
Note: It is assumed, when you are using Batch Update to identify an item as Returned, that you have the physical item in hand so that you can obtain the item barcode from the physical item.

Step	Action
1	<p>On the Batch Update screen, select Returned as the action, and enter or scan the item Barcode in the Circulating Item Barcode field. (The barcode can be scanned from the physical item.) This will enable NRE to identify the request that is being updated.</p> <p>If you choose to assign your own barcode to items that you borrow, enter or scan that barcode into the Circulating Item Barcode field. If your library has decided to use the Lender's barcode as the temporary barcode while the item is in your library, you can enter that in the Circulating Item Barcode field.</p>

Navigator Quick Reference: Returning

	 <p>The screenshot shows a web form with the following elements: an 'Action' dropdown menu set to 'Returned'; a text input field for 'Circulating Item Barcode' which is circled in red; a larger text area for 'Public Note'; and two buttons at the bottom, 'Submit' and 'Exit'.</p>
2	<p>If you do not have a barcode, and your library has been configured during the implementation process to use item Request Numbers as identifiers, you can enter the NRE item Request Number in the Our Number field (see below). If you do not have a local circulation system integrated with Navigator, the Our Number field should be used to identify the request.</p> <p>The item Request Number (Our Number) can be obtained from the paperwork (e.g., the shipping list) that accompanies a borrowed item. It can also be obtained from the hitlist that displays when you perform a Request Search or use the NRE Work Queue. NRE will use either the Request Number or the item barcode to identify the request being updated.</p>  <p>The screenshot shows a web form similar to the first one, but with an 'Our Number' text input field highlighted by a red oval. The 'Action' dropdown is still set to 'Returned'. The 'Circulating Item Barcode' field is present but empty. The 'Public Note' area and 'Submit'/'Exit' buttons are also visible.</p>
3	<p>Add a Public Note, if desired (e.g., letting the Lender know that you are returning the item), and click Submit .</p>
4	<p>After you click Submit and change the status of the item to Returned, the screen will refresh with Returned as the default action, ready for</p>

you to enter the next item to be returned. Either of the following screens will display, depending on your configuration:

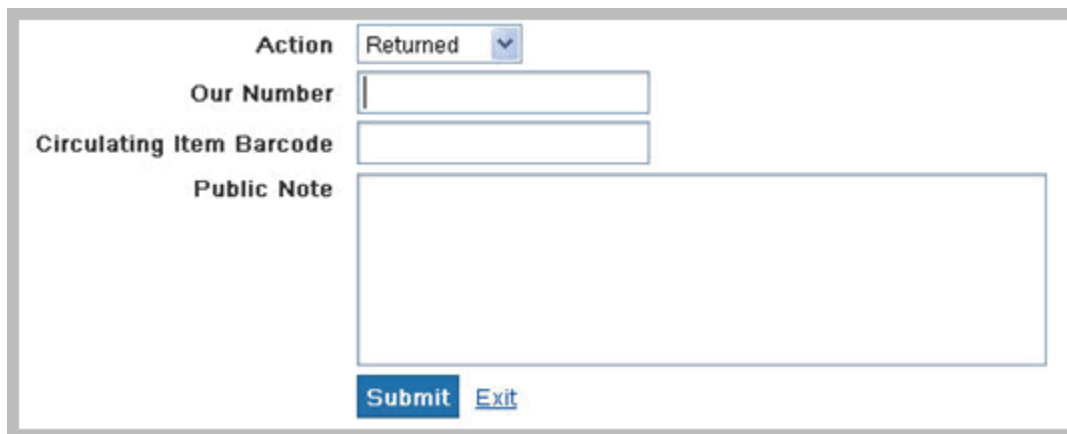


Action

Circulating Item Barcode

Public Note

[Exit](#)



Action

Our Number

Circulating Item Barcode

Public Note

[Exit](#)

Returning Items Individually

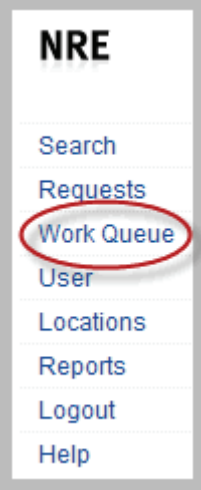
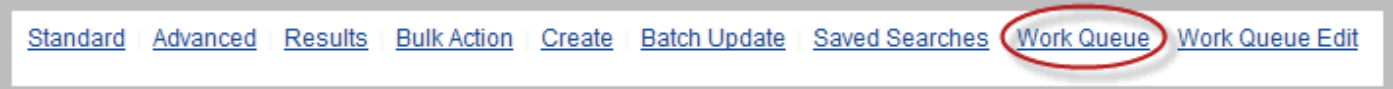
If you have only one item to return, or if you need more detail on an item to be returned, you can search for the item request in the Received category of the **Work Queue**, or the Standard or Advanced **Request Search**.

Note: It is assumed, when you are returning items individually that you have the physical item and its accompanying paperwork (shipping list, book band, etc.) in hand so that you can obtain the Request Number. If you have the item barcode, the **Batch Update** will probably be a quicker way to update the record in NRE.

Work Queue

You can locate a Received item and flag it in the system as **Returned** by means of the Work Queue.

Navigator Quick Reference: Returning

Step	Action
1	<p>Access the Work Queue either from the left-hand panel of the NRE interface:</p>  <p>Or from the top of the NRE interface:</p> 
2	<p>In the Borrower column, locate the Received category and click on the number indicating the number of Received items.</p>

Borrower	
Category	Count
Idle / Check Manual	<u>1</u>
Pending	<u>7</u>
Pending > 4 days	<u>7</u>
Pending > 2 weeks	<u>7</u>
Terminated	0
End of lender string	0
Conditional	0
Cancel Pending	<u>3</u>
Messages	0
Staff Review	0

Shipped	<u>10</u>
Shipped > 1 week	<u>7</u>
Shipped > 2 weeks	<u>7</u>
Received	<u>2</u>
Renew Pending	0
Overdue	0
Recalled	<u>1</u>
Returned	<u>4</u>

Reports	
Received List	0
Returned List	0

3 Locate the item in the resulting hitlist and use the drop-down box to select the Returned action.

Navigator Quick Reference: Returning

1433 : 1582 *** Train 1-01 : Train 1-03 ** 123456789

Guns, germs, and steel : the fates of human societies

Jared M Diamond

Status: **Returned**: Authorisation: **Processed** Last Action: **Returned: 13 Nov 2009** Lender string: 2 of 2

Returned

4 Selecting the Returned action by clicking the button displays the following:

Action: Returned

[Reset](#)

Our Number 1433

Status Returned

Title Guns, germs, and steel : the fates of human societies

Author Jared M Diamond

Return Date (e.g. 10 Jun 2009)

Returned Via

Insured Amount

Insured Currency

Circulating Item Barcode 123456789

Public Note

Private Note

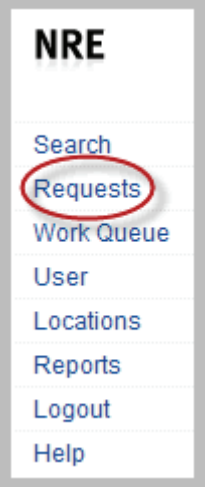
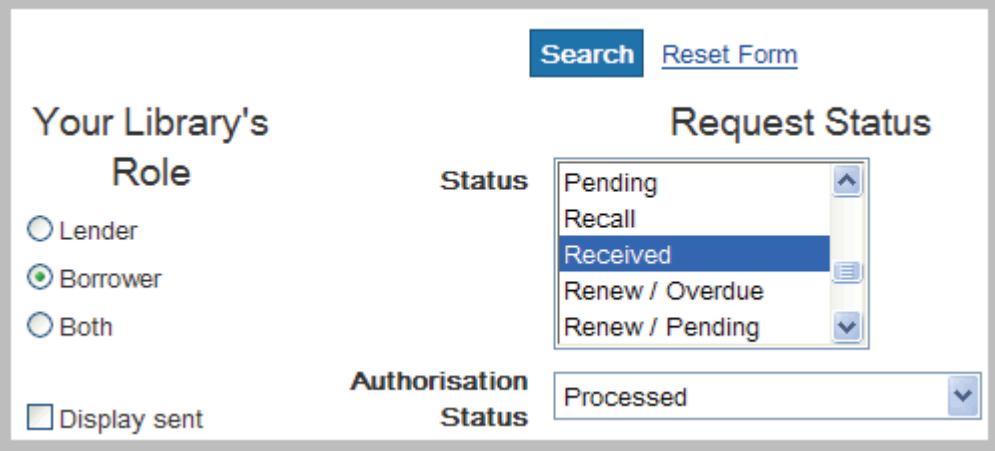
The Return Date defaults to today's date. Change it if necessary.

You can also enter a Public Note for the Lender or a Private Note for your staff use only.

5 Click on the button to complete the action. A confirmation screen displays, indicating that the action was successful.

6	For additional information on what happens after clicking the Return button, please see Step 6 of the Request Search procedure.
----------	---------------------------------------------------------------------------------------------------------------------------------

Request Search

Step	Action
1	<p>Click Requests in the left-hand panel of the NRE interface:</p>  <p>The screenshot shows a vertical menu titled 'NRE' with the following items: Search, Requests (circled in red), Work Queue, User, Locations, Reports, Logout, and Help.</p>
2	<p>Using the Request Search screen, find the relevant Request record, using the following parameters:</p> <ul style="list-style-type: none"> • Your Library's Role: Borrower • Status: Received • Authorization Status: Processed  <p>The screenshot shows the 'Request Search' form with the following settings: <ul style="list-style-type: none"> Your Library's Role: Borrower (selected) Status: Received (selected in a dropdown menu) Authorisation Status: Processed (selected in a dropdown menu) <input type="checkbox"/> Display sent Buttons: Search, Reset Form </p>
3	Click Search .
4	Locate the item to be returned in the resulting hitlist and use the drop-down box to select the Returned action.

Navigator Quick Reference: Returning

1945 : 1946 *** Pasadena PL : San Antonio PL Central

Windows Vista for dummies /

Andy Rathbone | ISBN: 0471754218, 9780471754213, 9780470121030, 0470121033

Status: **Received**: Authorisation: **Processed** Last Action: **Received: 22 Sep 2009**

Returned

5 Click the button.

6 When you click the button, the following screen displays:

Request

Action: Returned

[Reset](#)

Our Number 1945

Status Received

Will Supply Reason other

Title Windows Vista for dummies /

Author Andy Rathbone

Return Date (e.g. 10 Jun 2009)

Returned Via

Insured Amount

Insured Currency

The screenshot shows a web form for returning an item. It has three main sections:

- Public Note:** A text area for notes visible to the lender.
- Private Note:** A text area for notes visible only to staff.
- Notes:** A list of previous notes with timestamps and locations. Two notes are visible:
 - 22 Sep 2009 12:16 (From San Antonio P...): this book is fragile handle w...
 - 22 Sep 2009 12:04 (Local, REQUEST): I saw this on oprah

 At the bottom right, there are buttons for **Return** and **Rese...** (likely Reserve).

The Return Date defaults to today's date, but can be changed if needed. You can also enter a Public note which will be sent to the lender or a Private Note for your staff use only.

7 Click the **Return** button to complete the action. A confirmation screen displays, indicating that the action was successful.

8 Once items have been returned, they appear on the Returned List report, which is available from the Borrower Work Queue.

The screenshot shows a table of reports with two columns. The 'Returned List' report is circled in red.

Renew Pending	<u>1</u>	Overdue Today	<u>3</u>
		Overdue	0
Overdue	0	Overdue > 4 weeks	0
Recalled	<u>1</u>		
Returned	<u>4</u>		
Reports		Reports	
Received List	<u>1</u>	Pick List	<u>1</u>
Returned List	<u>1</u>	Shipping List	<u>1</u>

The Returned List is in PDF format. It can only be printed once from the Work Queue

Navigator Quick Reference: Returning

but can later be printed again if necessary by going to the Reports area of NRE and selecting Batch Reruns.

- 7 The following is a sample of a Returned List. Since the Returned List can be customized by your consortium, it may not look exactly like this one.

		Return Slip
TO:	Train 16 Location 1600 16th Place Sixteen, CA 16001	
PHONE:	(999) 555-1600	
Method:		
Insured:		
Supplier:	Train 16 Location (Train 16)	
<hr/>		
From:	Train 15 Location 1500 15th Ave Fifteen, MA 15000	
PHONE:	(999) 555-1500	
<hr/>		
Request Info:	Train 15 3534	Doc Received:
Number of Units:		
TITLE:	The great influenza: the epic story of the deadliest plague in history	
AUTHOR:	Barry, John M., 1947-	
Article Title:		
Article Author:		
PATRON NOTES:		

Navigator Questionnaires and Support Material

The Returning 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?
- Are there situations when you are a borrowing library when you would want to send an e-mail to a patron? If so, what are those situations?

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

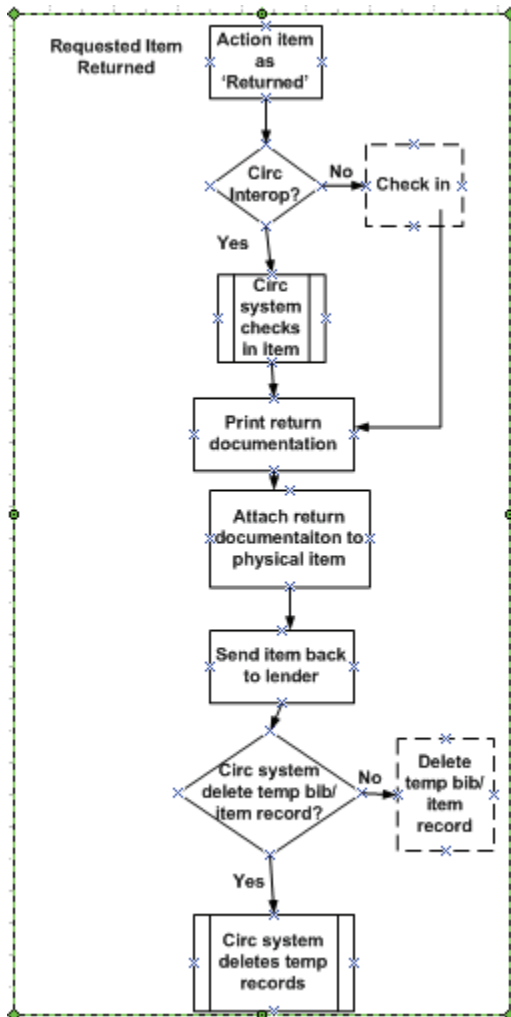
<http://www.oclc.org/us/en/navigator/support/default.htm> . They include:

- 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.

Basic Workflow: Returning

The diagram that follows describes the basic workflow for returning borrowed library items.



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

Ordering copies of this publication

	Action
1	To order additional copies of this publication, send an e-mail request to orders@oclc.org . Include the product code (REF1144) found at the bottom of this page.
2	You may also use the OCLC Index of Documentation at: https://www3.oclc.org/documentation/ . If the Order hard copy link is available, you may use it to request a printed copy.

Notes

Use this section to record notes about the Returning process and local practices employed by your library and your consortium.

Navigator Quick Reference: Returning

Notes

Use this section to record notes about the Returning process and local practices employed by your library and your consortium.

Notes

Use this section to record notes about the Returning process and local practices employed by your library and your consortium.

Notes

Use this section to record notes about the Returning process and local practices employed by your library and your consortium.



ISO 9001 Certified

The following OCLC product, service and business names are trademarks or service marks of OCLC, Inc.: OCLC, WorldCat, WorldCat Resource Sharing and "The world's libraries. Connected."

In addition, the WorldCat symbol and OCLC symbol are service marks of OCLC. Third-party product and service names are trademarks or service marks of their respective owners.

OCLC grants permission to photocopy this publication as needed.

Product Code REF1144
0711/2000368W .5M, OCLC