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# WorldCat Navigator: The Implementation Process

## The Implementation Process

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### *How long will it take to implement Navigator?*

In general, the implementation process will take between 90 and 120 days. How closely we adhere to this time scale, however, is directly dependent on the responsiveness of the libraries in the consortium. Navigator implementations require collecting critical pieces of information from each participating institution about lending policies, ILS, user authentication, current workflows, and locations (such as those used for pick-up, for managing requests, and for shelving). Questionnaires and spreadsheets are used to gather most of the information needed from libraries. How quickly questionnaires and other documents are completed and returned to the OCLC Implementation Manager impacts the project's overall timeline.

Additionally, each library needs to install and configure EZproxy and some institutions may need to install or upgrade ILLiad as part of their Navigator implementation. Like the questionnaires, how quickly libraries are able to complete these activities affects the overall timeline.

### *What is the overall process?*

A Navigator implementation begins with the consortium's Implementation Team Leaders meeting with OCLC Implementation Managers and concludes with a successful launch of the service to your library users. In between, the OCLC WorldCat Navigator Implementation Team works with you and your team to reach several key milestones during four phases of a comprehensive program. These milestones include:

- Analyzing and evaluating workflows
- Creating and executing a project work plan

- Configuring and testing service components
- Defining a request form
- Marketing and promoting the service

To illustrate the overall process, the graphic below highlights the major phases and their activities during the project:

<b>Phase 1: Preparation, Planning and Kickoff</b>	<b>Phase 2: Configuration and Testing</b>	<b>Phase 3: Training</b>	<b>Phase 4: Roll- out</b>
<ol style="list-style-type: none"> <li><b>1.</b> Complete the Implementation Form</li> <li><b>2.</b> Assemble library implementation team</li> <li><b>3.</b> Attend Batchload webinar</li> <li><b>4.</b> Submit batchload orders</li> <li><b>5.</b> Kick off the project</li> <li><b>6.</b> Attend Questionnaire webinar</li> <li><b>7.</b> Attend Workflow webinars</li> </ol>	<ol style="list-style-type: none"> <li><b>1.</b> Return Questionnaires</li> <li><b>2.</b> Test Group catalog</li> <li><b>3.</b> Install/configure EZproxy (test and report issues)</li> <li><b>4.</b> Upgrade/install ILLiad V. 7.3+ (test and report issues)</li> <li><b>5.</b> Install ILLiad V. 7.3+ Webservice plug-in (test and report issues)</li> <li><b>6.</b> Configure authentication (test and report issues)</li> <li><b>7.</b> Configure circulation system for Gateway interoperability (test and report issues)</li> <li><b>8.</b> End-to-end acceptance testing of all systems</li> <li><b>9.</b> Locally index OCLC number (can be done any time during Phase 2)</li> </ol>	<ol style="list-style-type: none"> <li><b>1.</b> Select staff trainers</li> <li><b>2.</b> Trainers participate in train-the-trainer program</li> <li><b>3.</b> Trainers conduct staff training</li> </ol>	<ol style="list-style-type: none"> <li><b>1.</b> Meet with OCLC Customer Service division</li> <li><b>2.</b> Work with OCLC Marketing to promote the service</li> <li><b>3.</b> Create and deploy HTML search box</li> <li><b>4.</b> Initiate reports</li> </ol>