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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log in to your NRE staff interface (for example, <a href="https://texas.vdxhost.com/nre">https://texas.vdxhost.com/nre</a>), using your NRE staff User ID and Password.</td>
</tr>
<tr>
<td>2</td>
<td>Search for a user by following the steps under <strong>Searching for a user record</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>If you do not find the user, create a user record by following the steps under <strong>Creating a user record</strong>.</td>
</tr>
</tbody>
</table>
| 4    | Conduct a search using **Advanced Search**:
  - Choose the relevant search field from the drop-down list.
  - Type search terms.
  - Click **Search**. |
| 5    | Find the needed item in the results:
  - 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

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**.
User records matching your search will display:

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:

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

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

**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.

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

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

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

**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:

```
Standard  Advanced  Results  Bulk Action  Create
```

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.
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.

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

The following filter options are available:

- **Format(s):** Select one of 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.
Navigator Quick Reference: Creating Requests on Behalf of a Patron

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.

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:

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

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.

The bibliographic details and holdings will be displayed:
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.

<table>
<thead>
<tr>
<th>Location</th>
<th>Region</th>
<th>Call Number</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abilene Public Library</td>
<td>BCLS5</td>
<td>WORSTX</td>
<td>Circulation status undefined</td>
</tr>
</tbody>
</table>

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:

**Requesting items found in a search**

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

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

![Lender String Details](image)

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

**Notes**

![Notes](image)

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

**Patron details**

![Patron Details](image)

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**

![Additional Service Details](image)

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**

![Delivery Details](image)

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.
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**

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>To order additional copies of this publication, send an e-mail request to <a href="mailto:orders@oclc.org">orders@oclc.org</a>. Include the product code (REF1149) found at the bottom of this page.</td>
</tr>
<tr>
<td>2</td>
<td>You may also use the OCLC Index of Documentation at: <a href="https://www3.oclc.org/documentation/">https://www3.oclc.org/documentation/</a>. If the <strong>Order hard copy</strong> link is available, you may use it to request a printed copy.</td>
</tr>
</tbody>
</table>