The Basic Check-in Process

When an item you have lent to a borrowing library is returned to you, you must perform a Checked In action to finish the request in NRE. This will send a message to the borrowing library that you have received the item back. Once you check the item in, the request will automatically be completed and removed from the Work Queue since the request has reached the end of its life cycle.

Batch Update

When you have received an item back from the borrowing library, you need to change the status of the request to Checked In.

The quickest way to mark items as Checked In is to use the Batch Update. This is accessed from the menu at the top of the NRE staff interface.

<table>
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<tr>
<th>Step</th>
<th>Action</th>
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<tr>
<td>1</td>
<td>The Batch Update option is accessed from the top of the NRE interface:</td>
</tr>
<tr>
<td></td>
<td>[Standard]   [Advanced]   [Results]   [Bulk Action]   [Create]   [Batch Update]   [Saved Searches]   [Work Queue]   [Work Queue Edit]</td>
</tr>
<tr>
<td>2</td>
<td>On the Batch Update screen, select <strong>Checked In</strong> as the action.</td>
</tr>
</tbody>
</table>

Enter or scan the barcode of the item in the Shipped Item Barcode field. This allows NRE to identify the request that is being checked in. Alternately, you may enter the Request Number in the **Our Number** field to identify the item, if your system is...
You can also enter a note in the **Public Note** field. This note will be sent to the Borrower with the response that indicates that you have checked in the item.

Click the **Submit** button.

Once the request has been checked in by NRE, the screen will refresh with Checked In as the action. You can then fill in the screen again to check in another item.

### Checking In Items Individually

If you don’t have a high volume of requests, or if you don’t have the barcode of an item to be checked in, you may find it more convenient to check items in individually. There are two ways to check in an individual item:

- The Work Queue
- The Request Search

Let’s look at both methods.
### Using the Work Queue

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</table>
On the resulting hitlist display, select Checked In on the drop-down menu. Click the Action button.
The Check In Date defaults to today’s date. You can modify it if needed. You can also enter a Public Note that will go to the Borrower, or a Private Note that will be seen only by your staff.

Click when you are ready to check in the item in.
## Using the Request Search

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<td>1</td>
<td>In the left-hand panel of the NRE interface, click Requests.</td>
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![NRE Interface](image)

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<td>2</td>
<td>On the Request Search screen, select the following settings:</td>
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<tr>
<td></td>
<td>• Your Library’s Role: Lender</td>
</tr>
<tr>
<td></td>
<td>• Status: Shipped</td>
</tr>
<tr>
<td></td>
<td>• Authorization Status: To Be Acknowledged</td>
</tr>
<tr>
<td></td>
<td>• Last Action: Returned-Indication</td>
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</table>

![Request Search Screen](image)
Navigator Quick Reference: Checking In

3. Click Search.

4. On the resulting hitlist display, select Checked In on the drop-down menu and click the Action button.

5. Request

Action: Checked In

Check In  Reset

Our Number: 1382
Status: Shipped
Title: A classification of land for management planning in the Kruger
Author: Venter, Frederik F Johannes
Check In Date: 10 Mar 2010 (e.g. 10 Jun 2009)
Shipped Item: 1114
Public Note

Private Note

Notes: 17 Dec 2009 17:43 (From Train 1-01, Send Note-indication)
This is an example of a public note
The Check In Date defaults to today’s date. You can modify it if needed. You can also enter a Public Note that will go to the Borrower, or a Private Note that will be seen only by your staff.

Click **Check In** when you are ready to check in the item in.
Navigator Questionnaires and Support Material

The Check In 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/navigator/support/default.htm](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: Check In

The diagram that follows describes the basic Check In workflow.

![Diagram of Check In Workflow](image-url)
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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