

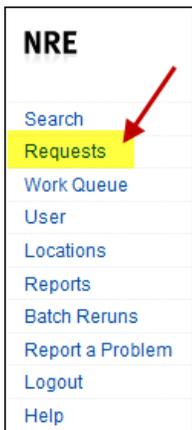
Navigator Quick Reference: Searching for Requests in NRE

Introduction

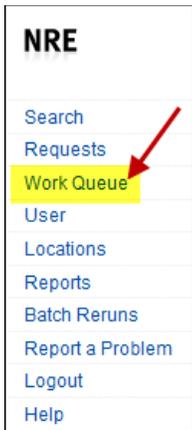
Occasionally, you will need to find details about an individual request to troubleshoot a problem, respond to a query from your patron, etc. You may also want to find requests that all have the same characteristic – from the same borrowing library, in the same status, etc. This is done by performing a search in the Requests area in **NRE**.

Searching

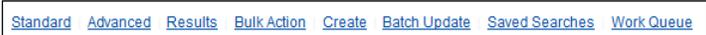
To search for requests, click the **Requests** link from the left navigation bar:



The search features can also be accessed from the Work Queue. Click the **Work Queue** link from the left navigation bar:



The options available along the top menu bar are context sensitive and relate to the Requests functions in **NRE**:

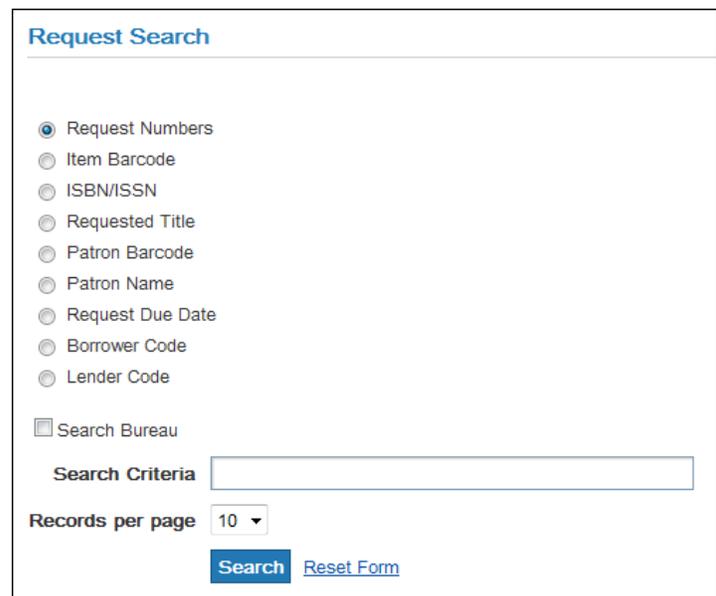


NRE has two ways to search for requests:

- Standard request search
- Advanced request search

Standard request search

The Standard Search screen is accessed by clicking on **Standard** from the top menu bar:



A list of search options is displayed.

| | |
|-----------------|---|
| Request Numbers | Use this option to search for an item by the request number. This can be your request number or request number of the lending partner. This search will retrieve completed and active requests. |
|-----------------|---|

| | |
|------------------|--|
| Item Barcode | User this option to search for a request by the barcode which was entered when the request was shipped or received. |
| ISBN/ISSN | Use this option to search for the ISBN or ISSN in the request. |
| Requested Title | Use this option to search for the Requested Title. You can search any significant word in the title. Note: This is a keyword search. |
| Patron Barcode | Use this option to search for requests by the NRE barcode of the patron requesting the item. The barcode entered in the search criteria must include the prefix. |
| Patron Name | Use this option to search for requests by any part of the name of the patron requesting the item. Note: This is a keyword search. |
| Request Due Date | Use this option to search for requests due on a specific date. The date is specified by the responder when the item should be returned to the responding library. Dates are entered in the following format: DD MMM YYYY (12 May 2012). You can search for a range of dates by using a [space]-[space] between the dates. For example: 12 May 2012 - 30 May 2012 |
| Borrower Code | Use this option to search for requests by the location code or the library name of the borrowing partner. |
| Lender Code | Use this option to search for requests by the location code or the library name of the current lending partner. |

Records per page: Select the number of records that will appear on your brief results page by selecting 5, 10, 15, or 20 in the drop-down box. By default, 10 records display per page.

Advanced request search

Sometimes you will want to do a more complex search for requests. The Advanced Request Search allows you to limit searches and combine conditions using Boolean operators to do more refined searching. It also allows you to search for completed requests using all possible search elements.

You can access the Advanced Request search by clicking the **Advanced** link in the top menu bar:



Your Library's Role

| Step | Action |
|------|---|
| 1 | <p>Choose a role for searching:</p> <ul style="list-style-type: none"> To search for requests you have placed, choose Borrower. To search for requests for which you are the responder, choose Lender. Search regardless of role by selecting Both. |
| 2 | <p>Choose how to display requests by checking the desired check box:</p> <ul style="list-style-type: none"> Display sent messages only displays borrowing requests that have been sent to potential lenders. |

| | |
|---|--|
| | <p>Note: Requests that have remained in a status of Idle will not be displayed when this box is checked.</p> <ul style="list-style-type: none"> • Display Terminated requests includes borrowing requests that have been terminated by staff in the search results. • Display Not Supplied requests includes requests that have a status of Not Supplied in the results set. If this box is not checked, NRE will not show Not Supplied requests (because they are no longer active). Note: It is good practice to always select this option. |
| 3 | <p>Choose how to display complete requests by choosing an option:</p> <ul style="list-style-type: none"> • Do not include Completed requests is selected by default because completed requests are not active. • Check Display Completed requests if you want to include completed requests in your search results. • Check Completed requests only if you want your search results to <i>only</i> include completed requests. |

Request Status

In this section, you may search for requests based on their current status, or events that have occurred in the history of the request. You can combine these status searches with any other searches on the Advanced search screen to produce very specific results.

The following searches are available:

| | |
|----------------------|--|
| Status | <p>The current status of the request, such as Idle, Received, Shipped, etc.</p> <p>TIP: To search for more than one status, use Ctrl+Click for individual selection or Shift+Click to select a range.</p> |
| Authorisation Status | <p>The current state of this request in the authorisation process, such as AutoMediate; AuthManual, Processed, Check Manual.</p> |

| | |
|------------------|---|
| Last Action | <p>The last action that was performed on the request, either by your library or by the partner in the request.</p> <p>Note: Actions performed by the request partner end in "Indication".</p> |
| Any Action | <p>Any action that has been performed on a request in its history. The action may have been done by your library or by the partner in the request ("Indication").</p> |
| Service Level | <p>The extent of the search and speed of delivery specified in an NRE request, such as Normal – Local Search or Rush – Local Search.</p> |
| Service Type 1 | <p>The principal type of request (either copy or loan).</p> |
| Log Message Type | <p>A notification or error message that has occurred during the lifetime of an NRE request. Common log message types are: End of rota reached, Local location on lender string, Maximum number of requests reached, etc.</p> |
| Format | <p>The type of material being requested, such as book, article printed, print journal, etc.</p> <p>TIP: To search for more than one format in the same search, use Ctrl+Click for individual selection or Shift+Click to select a range.</p> |

Other fields

This section allows you to search for specific requests using data within the request. Select the data element you would like to search and click **Search**. You can search for up to three request elements, using Boolean operators - *and*, *or*, and *and not* to specify the relationship between the elements.

When you are search using a date field, the date is entered in the following format: DD MMM YYYY (12 May 2012). You can search for a range of dates by using a [space]-[space] between the dates. **For example:** 12 May 2012 - 30 May 2012

Navigator Quick Reference: Searching for Requests in NRE

Searchable fields:

| | |
|-------------------------|--|
| Request Numbers | The NRE request number. You can search for “Our Number” or “Their Number”. |
| Item Barcode - Lender | The item identifier (barcode) used by the lender when shipping the item. |
| Item Barcode - Borrower | The item identifier (barcode) used by the borrower when the item was received. |
| Local Request Number | The borrower’s local request number. (Not normally used in NRE .) |
| Patron Name | The name of the user who requested the item. Note: This is a keyword search and you can search by any part of the name. |
| Patron Barcode | The user’s barcode in NRE , including the prefix. If a user’s barcode for authentication is 1234 and the library’s prefix is XYZ, then enter XYZ-1234 as the Patron Barcode. |
| Patron Status | The user category of the patron. You must use the patron status code to search successfully. The patron status is displayed in a borrowing request, in the Patron Details section: <p style="text-align: center;">Patron ID 2204 Patron Status PATRN</p> |
| Borrower Code | The identifier or name of the requesting library. |
| Lender Code | The identifier or name of the current responding library. |
| Due Date | The date specified by the responder when the item should be returned to the responding library. |
| Date Created | The date the request was first created. |
| Date Shipped | The date the Shipped action was taken on the request. |
| Need by Date | The date by which the item is needed as specified by the patron. |

| | |
|------------------------|---|
| Expiry Date | The date the request will move on from its current responder if there is no response. |
| Title / Author Keyword | A search on any word in the author or title fields. Note: Multiple words can be searched. For example , a search for “vines packer” will retrieve the title Valley of the vines by Packer, Joy Petersen. |
| ISBN/ISSN | The ISBN or ISSN of a requested title. |
| Series Title | The series associated with a requested title. Searches the first few words. Note: The search is a right-truncated, case-sensitive search. |
| Supplier Reference | A number sent by the supplier indicating how the request is identified in that system. (Not normally used in NRE .) |

Note: If you want to see all requests, click **Search** after setting your search preferences.

Sort options

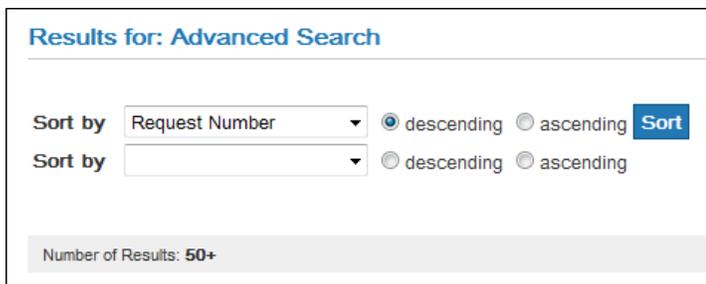
Normally, **NRE** sorts search results by the request number in descending order. You can choose to sort by another element of the request and add a secondary sort, should the first sort return many requests having the same first element.

Sort options available in Advanced search:

| | |
|-------------------------|---|
| Borrower Location | The location code of the borrowing library. |
| Borrower Name | The name of the borrowing library. |
| Current Lender Location | The location code of the responder to whom the request is currently assigned. |
| Current Lender Name | The name of the current lending library. |
| Date Requested | The date the request was made. |
| Expiry Date | The date the request will move on from its current responder if there is no response. |

| | |
|--------------------|---|
| Need Date | The date by which the user needs the item. This date may have been specified by the user or it may be a default date assigned by NRE. |
| Request Number | The request number, "Our Number". Note: This is the default sort. |
| Requested Title | An alphabetical sort by the title of the item requested. The sort includes leading articles. For example , a search for "The Becoming" is sorted by "T". |
| Status Change Date | The date the status changed. For example , from Shipped to Received. Note: This should not be confused with the "Last Action Date". |

You can also sort the search results after they are displayed by using the sort boxes at the top of the results screen:



Use **Format** to determine how the results will display:

- **Standard** format is the default, and shows the search results as a brief display. You can use the **Records per page** option to shorten or lengthen the number of requests you can see on a single page:



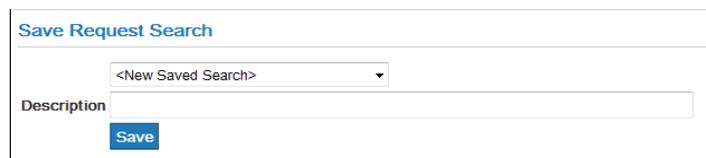
- The **Print** format displays most of the request details. Each request begins on a new page.

After you have displayed the results of a request search, you can begin to manage the requests. For each item listed you can:

- Select the **Action** button to perform an action on the request.
- Display the request **Details**. From the details, you can also perform an **Action** on the request.
- **Print** the request.
- Select requests for **Bulk Action**.

Save search

If you have performed an Advanced search which you may want to repeat periodically, you can save your search. Using the **Save Search** link:



Give the search a **Description** and click on **Save**.

Note: It is advisable to give the search a name that is descriptive of what type of requests the search retrieves. It will be helpful when you have many saved searches.

You can retrieve your saved searches using the **Saved Searches** link on the top menu:



You can then choose to **Run**, **Edit** or **Delete** a saved search.

Search Bureau

If you are logged in as a bureau administrator, you will see requests for the library within your bureau that is selected (at the bottom of the screen)/

Bureau - Tufts University ▼ Tufts - Ginn Library ▼

If you want to broaden your searches to include the whole bureau, select **Search Bureau**.

Standard request search:

Request Search

- Request Numbers
- Item Barcode
- ISBN/ISSN
- Requested Title
- Patron Barcode
- Patron Name
- Request Due Date
- Borrower Code
- Lender Code
- Search Bureau

Search Criteria

Records per page 10 ▼

[Reset Form](#)

Advanced request search:

Your Library's Role

- Lender
- Borrower
- Both

- Display sent messages only
- Display Terminated requests
- Display Not Supplied requests
- Search Bureau

Support

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