

# Navigator

## Quick Reference: Receiving

### The Basic Receiving Process

When an item you have requested from another library is received, the status must be changed in the NRE (Navigator Request Engine) staff interface to **Received**. The quickest way to receive a group of items at once is to use the **Batch Update** process.

### Batch Update

Upon receipt of an item, the item the status of the item request needs to be changed to **Received**. Batch Update is the best way to receive multiple items, and is also the preferred method for individual items. The Batch Update is accessed from the top of the NRE staff interface:

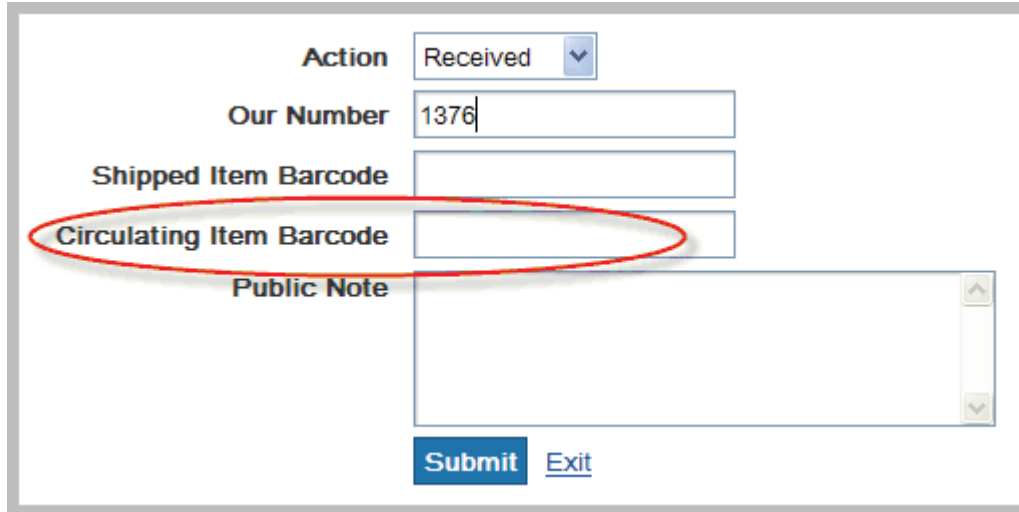
[Standard](#) [Advanced](#) [Results](#) [Bulk Action](#) [Create](#) [Batch Update](#) [Saved Searches](#) [Work Queue](#) [Work Queue Edit](#)

**Note:** It is assumed, when you are using Batch Update to identify an item as Received, that you have the physical item or its accompanying paperwork (shipping list, book band, or whatever the consortium uses to accompany a book from Lender to Borrower) in hand so that you can obtain the request number (from the paperwork) or the Shipped Item Barcode (from the physical item).

Step	Action
1	<p>On the Batch Update screen (see below), select Received as the action, and enter or scan the Shipped Item Barcode. (The barcode can be scanned from the physical item.) If you do not have the barcode, you can enter the NRE item request number in the Our Number field. The NRE Request Number (Our Number) can be obtained from the hitlist that displays after you perform a <b>Request Search</b> or use the NRE <b>Work Queue</b>. Either Our Number or the Shipped Item Barcode can be used by NRE to identify the request being updated.</p> <p>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>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, NRE will</p>

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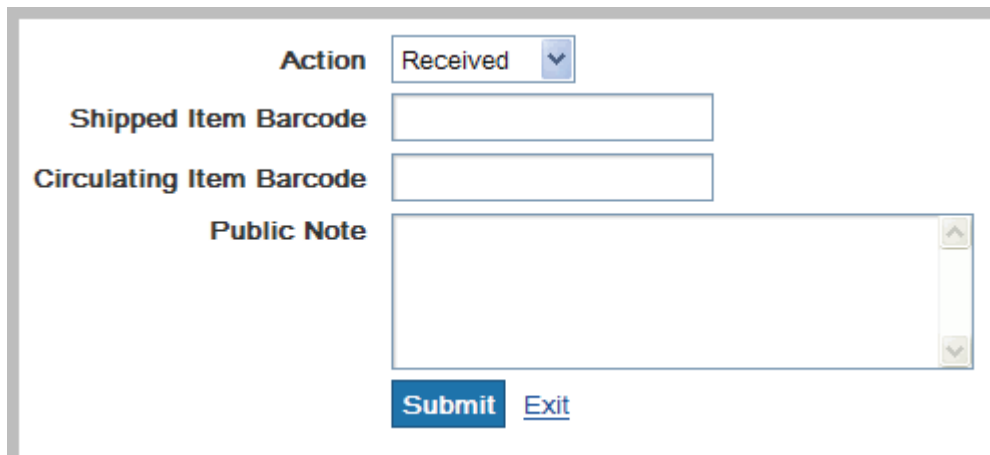
populate the Circulating Item Barcode field with the barcode that you enter in the Shipped Item Barcode field.



The screenshot shows a web form for receiving an item. The 'Action' dropdown is set to 'Received'. The 'Our Number' field contains '1376'. The 'Shipped Item Barcode' field is empty. The 'Circulating Item Barcode' field is empty and is highlighted with a red oval. The 'Public Note' field is empty. At the bottom, there are 'Submit' and 'Exit' buttons.

2 Add a Public Note, if desired (e.g., letting the Lender know that you have received the item), and click **Submit**.

3 Once the item has been marked as Received by NRE, the screen will display as follows, ready for you to mark the next item as received:



The screenshot shows the same web form as above, but now the 'Shipped Item Barcode' and 'Circulating Item Barcode' fields are empty. The 'Public Note' field is empty. At the bottom, there are 'Submit' and 'Exit' buttons.

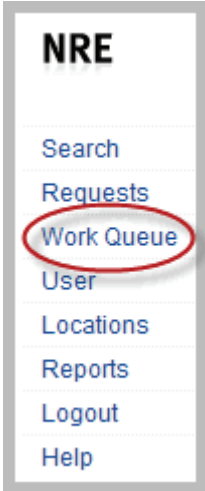
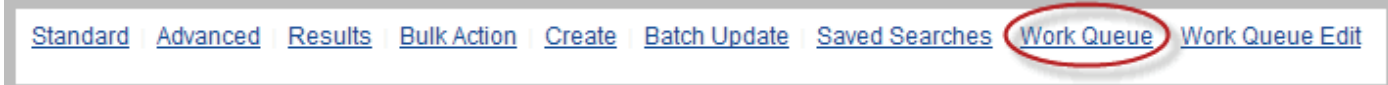
### Receiving Individual Items

Occasionally, you may need to receive an item individually—to note something out of the ordinary, modify the local due date, etc.

This can be done in several ways, but the first task is to locate the request. You can locate the relevant request via the NRE Work Queue or through a Request Search. Using the Work Queue or the Request Search is also useful when you do not have the physical item handy, and so do not have the item barcode.

#### Work Queue

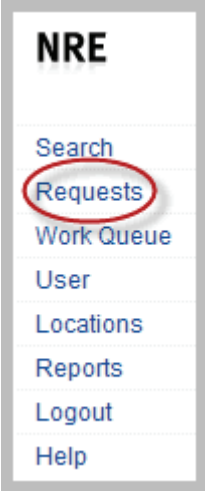
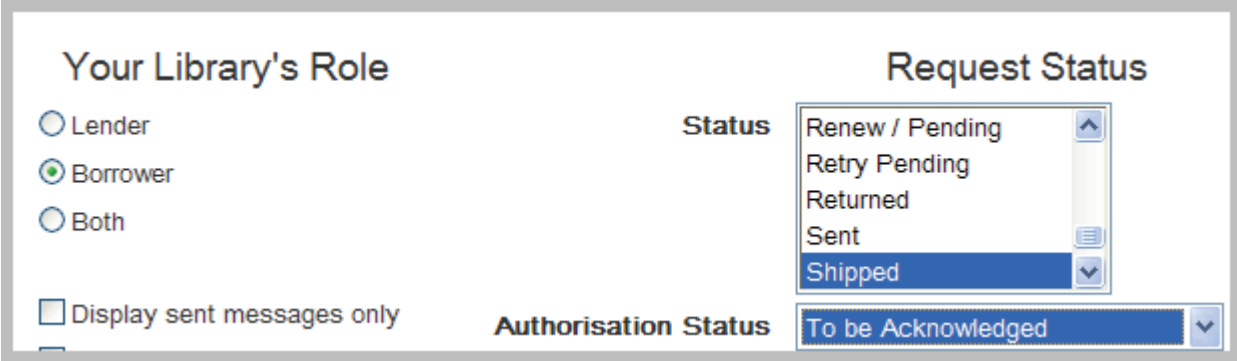
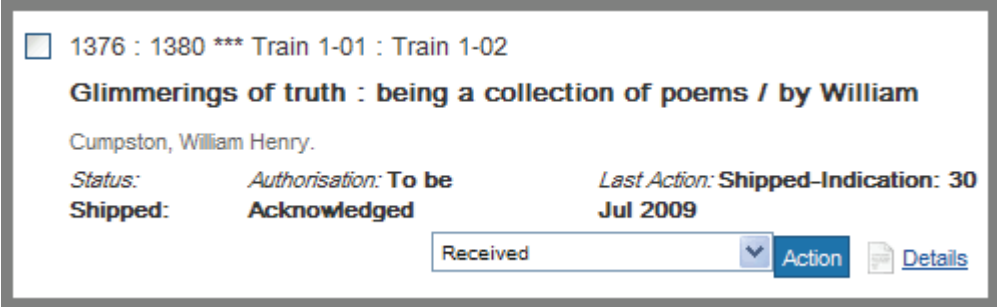
Use the Work Queue to locate a Shipped item that you need to mark as **Received**, as follows.

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

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	<table border="1"><thead><tr><th colspan="2">Borrower</th></tr><tr><th>Category</th><th>Count</th></tr></thead><tbody><tr><td>Idle / Check Manual</td><td><a href="#">1</a></td></tr><tr><td>Pending</td><td><a href="#">7</a></td></tr><tr><td>Pending &gt; 4 days</td><td><a href="#">7</a></td></tr><tr><td>Pending &gt; 2 weeks</td><td><a href="#">7</a></td></tr><tr><td> </td><td> </td></tr><tr><td>Terminated</td><td>0</td></tr><tr><td>End of lender string</td><td>0</td></tr><tr><td>Conditional</td><td>0</td></tr><tr><td>Cancel Pending</td><td><a href="#">3</a></td></tr><tr><td> </td><td> </td></tr><tr><td>Messages</td><td>0</td></tr><tr><td>Staff Review</td><td>0</td></tr><tr><td> </td><td> </td></tr><tr><td>Shipped</td><td><a href="#">1</a></td></tr><tr><td>Shipped &gt; 1 week</td><td><a href="#">1</a></td></tr></tbody></table>	Borrower		Category	Count	Idle / Check Manual	<a href="#">1</a>	Pending	<a href="#">7</a>	Pending > 4 days	<a href="#">7</a>	Pending > 2 weeks	<a href="#">7</a>			Terminated	0	End of lender string	0	Conditional	0	Cancel Pending	<a href="#">3</a>			Messages	0	Staff Review	0			Shipped	<a href="#">1</a>	Shipped > 1 week	<a href="#">1</a>
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3	<p>Locate the item in the resulting hitlist. Select Received in the drop-down menu and click the <b>Action</b> button.</p> <table border="1"><tr><td><input type="checkbox"/> 1380 : 1376 *** Train 1-01 : Train 1-02 ** CAROL MILLER <b>Glimmerings of truth : being a collection of poems / by William Cumpston, William Henry.</b> <i>Status: Shipped: Authorisation: Processed Last Action: Shipped: 30 Jul 2009</i></td></tr><tr><td>Checked In <input type="button" value="v"/> <input type="button" value="Action"/> <input type="button" value="Details"/></td></tr></table>	<input type="checkbox"/> 1380 : 1376 *** Train 1-01 : Train 1-02 ** CAROL MILLER <b>Glimmerings of truth : being a collection of poems / by William Cumpston, William Henry.</b> <i>Status: Shipped: Authorisation: Processed Last Action: Shipped: 30 Jul 2009</i>	Checked In <input type="button" value="v"/> <input type="button" value="Action"/> <input type="button" value="Details"/>																																
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4	<p>For additional information on using the Work Queue to receive items, see <b>Steps 4 through 7 of the Request Search procedure</b>, in this document.</p>																																		

Request Search

Step	Action
1	<p>Click Requests in the left-hand panel of the NRE interface:</p> 
2	<p>Using the Request Search screen (see below), find the relevant Request record, using the following parameters:</p> <ul style="list-style-type: none"> <li>• Your Library's Role: Borrower</li> <li>• Status: Shipped</li> <li>• Authorization Status: To Be Acknowledged</li> </ul>  <p>Click <b>Search</b>.</p>
3	<p>Locate the item in the resulting hitlist and use the drop-down box to select the Received action.</p> 
4	<p>When you click the <b>Action</b> button to initiate the Received action, the following screen</p>

displays:


The screenshot shows a web form titled "Request" with the sub-header "Action: Received". In the top right corner, there are two buttons: "Receive" (highlighted in blue) and "Reset" (a blue link). The form contains the following fields and values:

- Receiving from:** Train 1-02
- Our Number:** 1376
- Status:** Shipped
- Title:** Glimmerings of truth : being a collection of poems / by William
- Author:** Cumpston, William Henry.
- Service Type 1:** A dropdown menu with "Loan" selected.
- Received Date:** 21 Feb 2010 (with a calendar icon and example "(e.g. 10 Jun 2009)")
- Due Date:** 20 Aug 2009
- Local Due Date:** 20 Aug 2009 (with a calendar icon and example "(e.g. 10 Jun 2009)")
- Circulating Item Barcode:** An empty text input field.
- Shipped Item:** CAROL MILLER
- Patron Name:** Patron Train 1-01
- Public Note:** A large text area with up and down arrow controls on the right side.

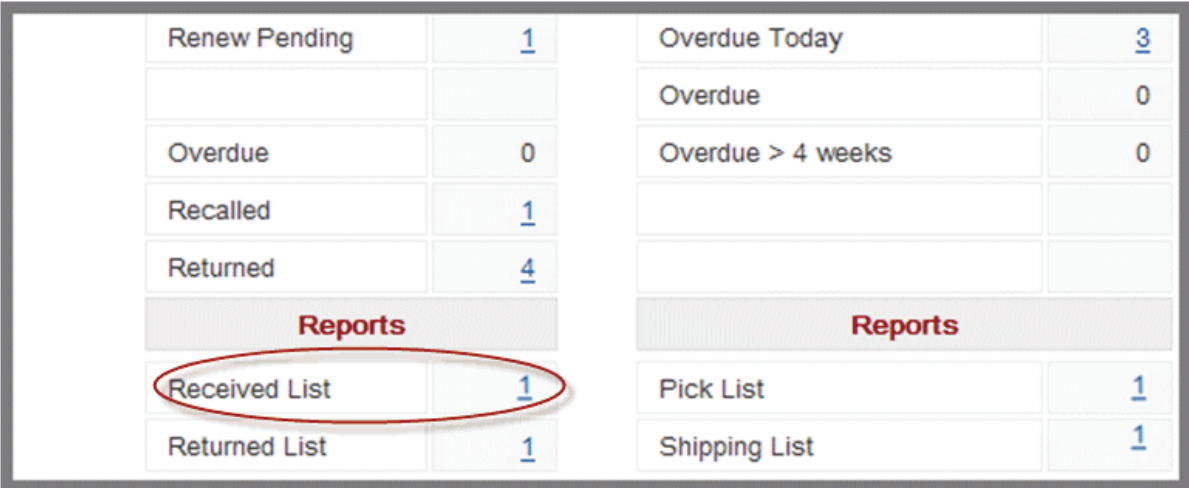
The Local Due Date defaults from the rules created when your NRE system was configured by your OCLC Implementation Manager. You can modify the Local Due Date and/or the Received Date, if needed.

Add the item barcode, if you have it, in the Circulating Item Barcode field.

You can also enter a Public note which will be sent to the Lender or Private Note for your staff use only. Notes sent from the Lender will also be visible on this screen.

5	After you have entered the appropriate receiving information, click the  button. You will receive a confirmation that the action was successful.
6	Once items have been received, they appear on the Received List report, which is available from the Borrower Work Queue. This report can be used to notify patrons that items they have requested have been received.

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The screenshot shows two side-by-side report menus. The left menu lists: Renew Pending (1), Overdue (0), Recalled (1), Returned (4), a 'Reports' header, Received List (1), and Returned List (1). The right menu lists: Overdue Today (3), Overdue (0), Overdue > 4 weeks (0), a 'Reports' header, Pick List (1), and Shipping List (1). The 'Received List' item in the left menu 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>		
<b>Reports</b>		<b>Reports</b>	
Received List	<u>1</u>	Pick List	<u>1</u>
Returned List	<u>1</u>	Shipping List	<u>1</u>

The Received List is in PDF format. It can only be printed once from the Work Queue 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 Received List. It can be used to accompany a book or other requested item that is on the Hold shelf, waiting to be picked up. Since the Received List can be customized by your consortium, your Received Lists may not look exactly like this one.

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### Train 15 Location

#### Received Slip

**\*\* Please Do Not Remove Band From Item \*\***

DATE DUE: 03-SEP-2009

Patron Name: Patron Train 15  
Department:  
Email: bretzm@oclc.org

User ID: TRAIN15PATRON  
Status:

PICKUP LOCATION: Train 15 Location

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REQUEST NO: 3534  
Supplier: Train 16 Location

TITLE: The great influenza: the epic story of the deadliest plague in history  
AUTHOR: Barry, John M., 1947-  
Publisher Info: New York, Viking, c2004.

VOLUME:  
Volume/Edition: Date: Pages:

Article Title:  
Article Author:  
ISBN: 0670894737 (alk. paper);9780670894734 (alk. paper)  
ISSN:

Number of Units:  
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PATRON  
NOTES:



### Navigator Questionnaires and Support Material

The Receiving 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:

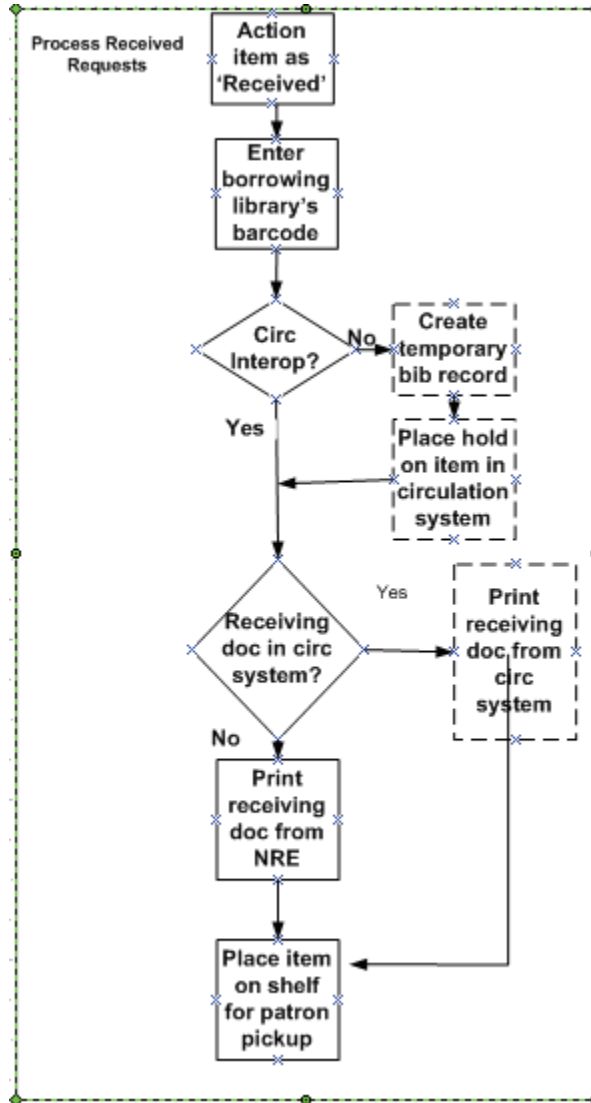
<http://www.oclc.org/us/en/navigator/support/default.htm> . They include:

- 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: Receiving

The diagram that follows describes the Basic Receiving workflow.



### Support

#### OCLC support staff:

E-mail: [support@oclc.org](mailto: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)

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### Notes

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

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