

Navigator


Quick Reference: Shipping

The Basic Shipping Process

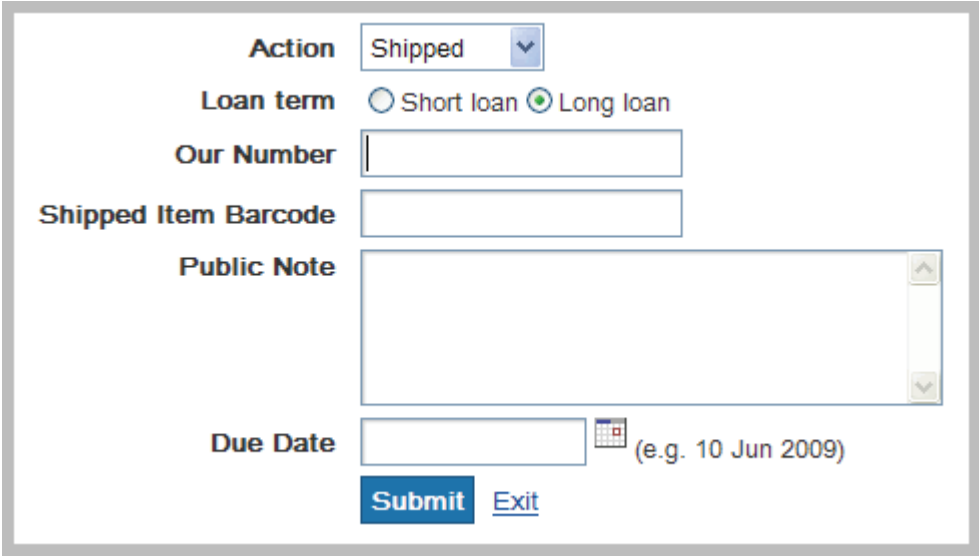
If you have a requested item in stock and are willing to lend it to a borrowing library, you should notify the requesting library through the Navigator Request Engine (NRE) that you are sending the item. This will send a message to the Borrower that you are shipping the item, and it will prevent the request from expiring and moving on to the next potential lender in the lender string.

Batch Update

The quickest way to mark an item as **Shipped** is to use the **Batch Update**. The Batch Update is also useful when you are shipping multiple items.

Step	Action
1	<p>The Batch Update option is accessed from the top of the NRE interface:</p>  <p>After clicking Batch Update, locate the initial request to be shipped on the Batch Update screen (see below). If you have the physical item in hand, obtain the item barcode from it. You can also identify the item by using the Request Number from the picklist. If you have neither of these means of identification, locate the item either through a Request Search or via the Work Queue. (See Using the Request Search and Using the Work Queue on the following pages.)</p>
2	<p>On the Batch Update screen, select Shipped in the Action drop-down box. Enter the NRE Request Number in the Our Number field, or enter the barcode from the physical item in the Shipped Item Barcode field. (You may be able to find a bar-coded version of the NRE request number on your picklist.) Indicate whether the loan is a short-term or long-term one. Modify the Due Date and add a Public Note, if needed, to indicate to the Borrower that the item has been shipped.</p>

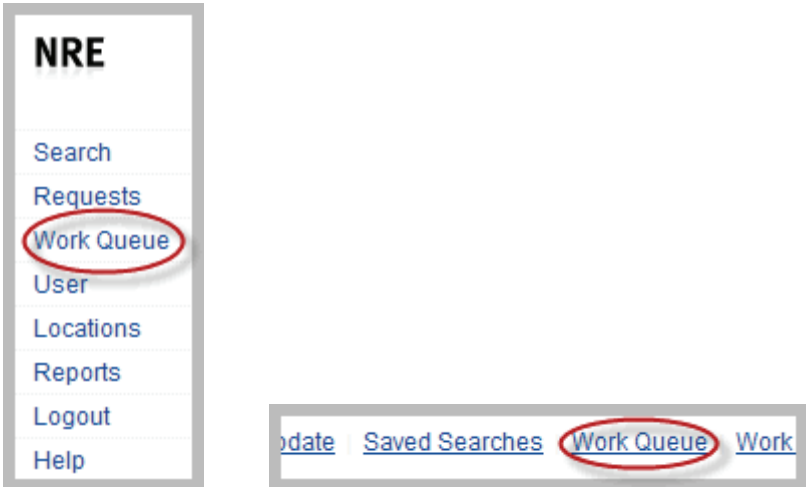
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3	Click Submit .
4	Once the request has been shipped by NRE, the screen will refresh with Shipped as the action. You can then fill in the screen again to ship another item.

Shipping Individual Items

When you are shipping individual items, the first step is to locate the request to be shipped. You can locate it either via the **Work Queue** or through a **Request Search**. Let's look at both methods.

Using the Work Queue

Action	
1	Access the NRE Work Queue, either by selecting it from the left-hand panel or by clicking the link at the top of the NRE staff interface screen. 
2	In the Lender area of the Work Queue, select one of the categories containing an item to be shipped (New Requests, Will Supply, etc.) by clicking the number in the Count

column.

Lender	
Category	Count
New Requests	4
New Requests Expiring Today	0

3 On the resulting hitlist display, select Shipped in the drop-down menu and click the **Action** button.

1577 : 1395 *** Train 1-03 : Train 1-01

Guns, germs, and steel : the fates of human societies

Jared M Diamond

Status: In Process: Authorisation: **Acknowledged** Last Action: REQUEST-Indication: 30 Jul 2009

Shipped **Action** Details Acknowledge

4 Clicking the **Action** button displays the following screen, which is shown on this page and on the following page.

Action: Shipped

Ship [Reset](#)

Request Details

Our Number 1577

Status In Process

Authorisation Status







Shipped Item

Title Guns, germs, and steel : the fates of human societies

Author Jared M Diamond

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Service Details

Service Type	Loan
Shipped Item	<input type="text"/>
Ship Date	<input type="text" value="15 Mar 2010"/>  (e.g. 10 Jun 2009)
Due Date	<input type="text" value="11 May 2010"/>  (e.g. 10 Jun 2009)
Media Type	<input type="text" value="Printed"/> 
Delivery Method	<input type="text"/> 
E Delivery Params	<input type="text"/> 
Conditions	<input type="text"/> 

Copyright Info

Payment Details

Borrower	Train13
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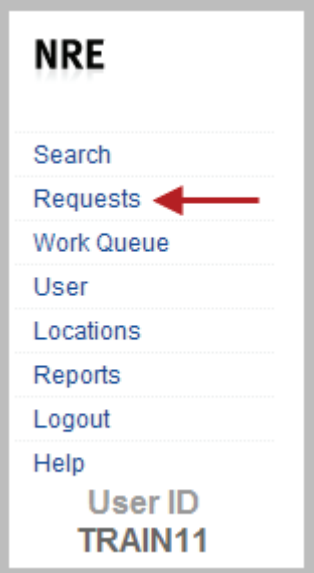
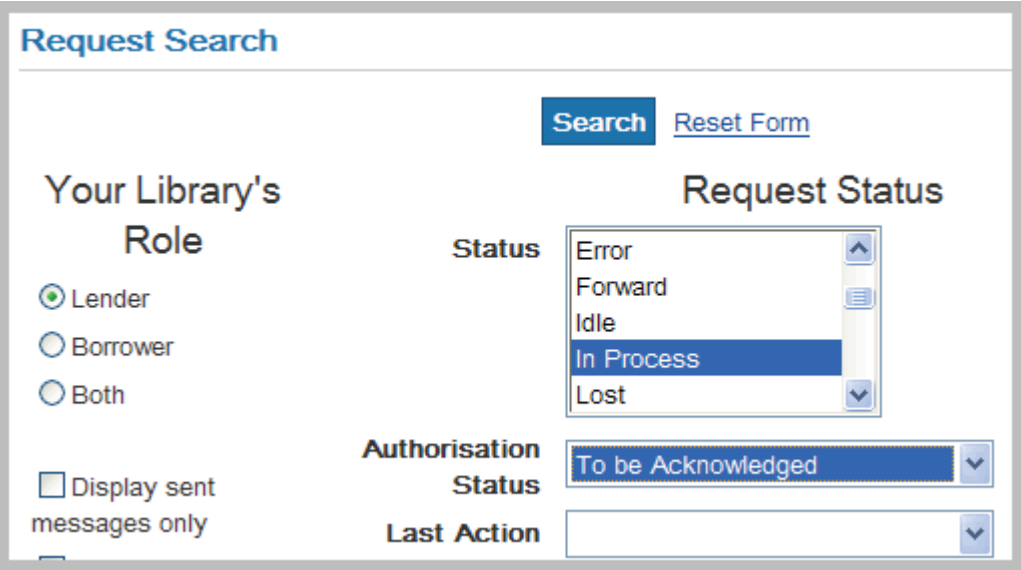
In order for this transaction to be invoiced via IFM it is important that you enter the correct *Ship Cost field*.

Ship Cost	<input type="text"/>
Currency	United States Dollar

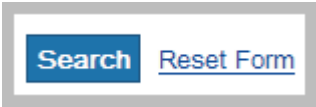
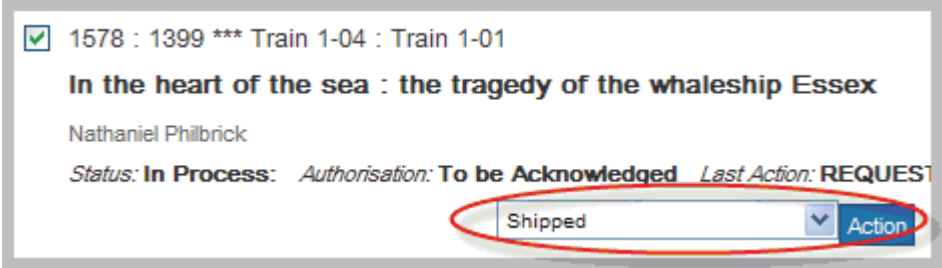
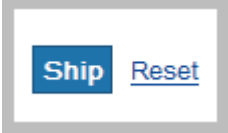
[Reset](#)

Before clicking the button to ship the item, you can modify the Due Date, enter a barcode, and enter a Public or Private Note, if needed. You can also update the Shipping Costs, Delivery Method, and other loan details.

Using the Request Search

Step	Action
<p>1</p>	<p>In the left-hand panel of the NRE interface, click Requests.</p> 
<p>2</p>	<p>On the Request Search screen, select the following settings:</p> <ul style="list-style-type: none"> • Your Library's Role: Lender • Status: In Process • Authorization Status: To Be Acknowledged  <p>Note: If your local circulation system is integrated with Navigator, the Authorization Status should be Processed and the Last Action should be Will Supply.</p>
<p>3</p>	<p>Click Search.</p>

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4	<p>Select Shipped and click the Action button.</p> 
5	 <p>Before clicking the Ship button to ship the item, you can modify the Due Date, add the Shipped Item barcode, and enter a Public or Private Note, if needed. You can also update the Shipping Costs, Delivery Method, and other details of the loan.</p>

Navigator Questionnaires and Support Material

The Shipping 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:

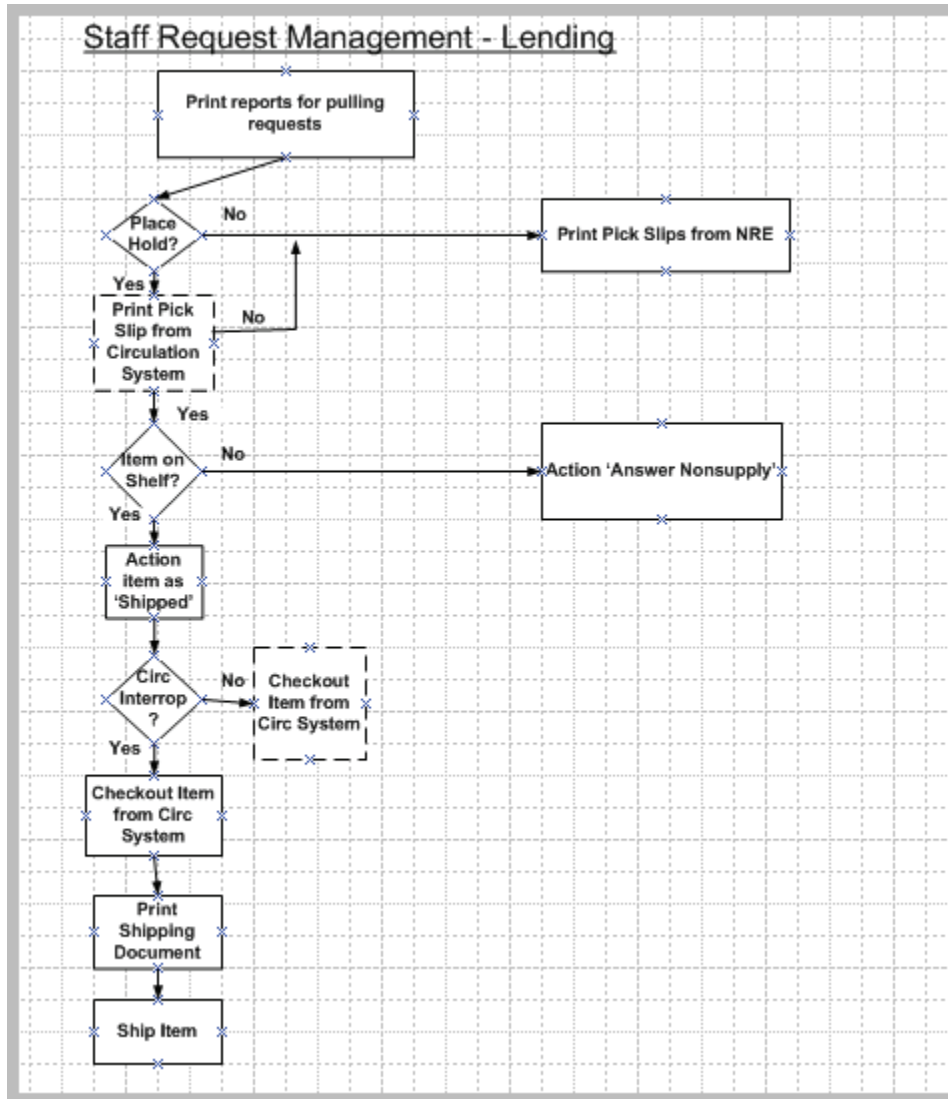
<http://www.oclc.org/us/en/navigator/support/default.htm> They include:

- 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: Shipping

The diagram that follows describes the basic Shipping workflow.



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)

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