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:

<table>
<thead>
<tr>
<th>Standard</th>
<th>Advanced</th>
<th>Results</th>
<th>Bulk Action</th>
<th>Create</th>
<th><strong>Batch Update</strong></th>
<th>Saved Searches</th>
<th>Work Queue</th>
<th>Work Queue Edit</th>
</tr>
</thead>
</table>

**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).

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>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 <strong>Request Search</strong> or use the NRE <strong>Work Queue</strong>. Either Our Number or the Shipped Item Barcode can be used by NRE to identify the request being updated. If you do not have a local circulation system integrated with Navigator, the Our Number field should be used to identify the request. 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...</td>
</tr>
</tbody>
</table>
populate the Circulating Item Barcode field with the barcode that you enter in the Shipped Item Barcode field.

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:
## 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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Access the Work Queue either from the left-hand panel of the NRE staff interface:</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="NRE Interface" /></td>
</tr>
<tr>
<td></td>
<td>Or from the top of the NRE staff interface:</td>
</tr>
<tr>
<td></td>
<td>Standard</td>
</tr>
<tr>
<td>2</td>
<td>In the Borrower column of the Work Queue, locate the Shipped category and click on the number indicating the number of Shipped items:</td>
</tr>
</tbody>
</table>
Navigator Quick Reference: Receiving

3. Locate the item in the resulting hitlist. Select Received in the drop-down menu and click the button.

4. For additional information on using the Work Queue to receive items, see Steps 4 through 7 of the Request Search procedure, in this document.
### Request Search

<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>1</td>
<td>Click Requests in the left-hand panel of the NRE interface:</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="NRE Interface" /></td>
</tr>
<tr>
<td>2</td>
<td>Using the Request Search screen (see below), find the relevant Request record, using the following parameters:</td>
</tr>
<tr>
<td></td>
<td>• Your Library’s Role: Borrower</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><img src="image" alt="Search Screen" /></td>
</tr>
<tr>
<td></td>
<td>Click <strong>Search</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>Locate the item in the resulting hitlist and use the drop-down box to select the Received action.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Received Item" /></td>
</tr>
<tr>
<td>4</td>
<td>When you click the <strong>Action</strong> button to initiate the Received action, the following screen appears:</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Received Screen" /></td>
</tr>
</tbody>
</table>
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.
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.

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.
Train 15 Location

Received Slip

** Please Do Not Remove Band From Item **

DATE DUE: 01-SEP-2009

Patron Name: Patron Train 15
Department: 
Email: brezza@oleo.org

PICKUP LOCATION: Train 15 Location

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:
Shipped Conditions:

PATRON NOTES:
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](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
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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<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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</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 Order hard copy link is available, you may use it to request a printed copy.</td>
</tr>
</tbody>
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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.
Navigator Quick Reference: Receiving

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