AgileElite Office User Guide

The University of Waterloo’s Central Stores department provides courier shipping services for the University. The AgileElite system supports the service. AgileElite enables authorized users to create a shipment request, view the shipment request and finally track the shipment.

For authorized access to the system, complete the registration form posted on the Central Stores website:


and send to Trevor Beatson, ECH, Central Stores.

The first time you use AgileElite Office on a computer, you will need to set up Internet Explorer, as it’s the only browser supported by AgileElite at this time. Following the setup of Internet Explorer, this User Guide describes how to Create a Shipment Request, View a Shipment Request and Track Shipments.

Setting up Internet Explorer:

STEP 1: From the Tools menu (or Tools drop down menu) in Internet Explorer, click on Internet Options.
STEP 2: On the Security tab, Click Trusted sites.

STEP 3: Click Custom level...

STEP 4: Under Miscellaneous, scroll down to Use Pop-up Blocker. Set to Disable.

STEP 5: Click OK.

In Windows XP, you get a warning:

Click Yes.

Click OK on the Security Tab.
A. Login to Agile

STEP 1: Using Internet Explorer, enter the following URL: https://agileshippii-pr.uwaterloo.ca/

STEP 2: Click on UW Shipping login
B. Create a Shipment Request

Hint:

- Use your WatAM/Nexus userid and password, if prompted to login (i.e., nexus\8characterUserid). You may not be prompted to login.
- To log out of the system, close the Tab or close Internet Explorer. Log out of the system when you are not using the system.
**STEP 1:** Double click on Agile Office Users

**STEP 2:** Click on Add New

**Hint:** If you have previously saved an address to your private address book, enter Search for Recipients criteria and search for the address to use in your request.
**STEP 3:** Enter the Ship To information. Click button for US addresses. **NOTE:** All yellow highlighted fields are required. If an address is correct, a green check mark will appear. If an address is incorrect, choices for the correct address will appear. Click on the correct address.

**HINT:**
- **Address:** Enter apartment or suite numbers on the second address line.
- **Email:** An email address helps the courier company with delivery.
- **Residential:** Click the Residential check box to indicate the address is for a home.
- **Instructions for Central Stores Shipper:** e.g. must be delivered by date and time; use a specific courier company; contents are fragile; etc.

**HINT:** If you plan to use the address for a future shipment, click before entering any additional information. The address will be saved to your private address book, and is only available to you.

**STEP 4:** When the Ship To address is outside of Canada, a message regarding Customs Declaration is presented. If the shipment contains only Printed Material (e.g. a document or papers), a customs declaration is not required. On the pop-up message, click OK, if the shipment contains printed material. Otherwise, click Cancel to indicate it is not printed material.

**HINT:** If using your default account, check the box and the Account Segments will fill in.

**STEP 5:** The Sender/Shipping Details can be overwritten, if shipping on behalf of someone else.

**STEP 6:** Enter the account segments for billing. The Account Segment is required regardless of third party or collect billing.
**STEP 7:** Enter the Request Shipment / Options.

**STEP 8:** Enter the **Quantity** for each **Description** line of the Shipment Contents. A unit **Value** is required for shipments delivered outside of Canada, and where the packaging is pallet or box. For example, 5 books valued at $20 each (Qty = 5, Description = books, Value = $20), or 10 x-rays valued at $100 each (as displayed in the first description line above).

**STEP 9:** Review your request. Once all required information is entered, the **Print** button will be enabled. Click to print your request form to your local printer.

**STEP 10:** Attach the printed Ship Request Form to your parcel and send to Central Stores Shipping.

**HINT:**

**Packaging:** Options include: Envelope, Box and Pallet. A pallet (or skid) is a large flat, wooden platform on which the items to be shipped are placed. Central Stores will weigh and measure the dimensions of all packages.

**Reason:** The value selected describes why you are shipping. If you choose **Other**, another box (Other Reason) will appear and an explanation is required.

**Insurance Amount:** Waterloo’s insurance deductible amount is $3000. If insurance is needed for the deductible amount, enter a value less than $3000. Note: The insurance value is not the replacement value of the item(s).

**Billing:** Choices are one of Prepaid, Collect or Third Party. If collect or third party billing, the billing account number and carrier fields will appear and values are required.
C. View a Shipment Request

**HINT:** There are two AgileViews:

- Use *AgileView – Ship Requests* to find the status of shipments that are not shipped by Central Stores.
- Use *AgileView – Shipments* to track shipments already processed by Central Stores.

**STEP 1:** Click on AgileView – Ship Requests

**HINT:** If you have closed Internet Explorer, go back to STEPS 1 and 2 in section “A. Login to Agile” of this document.

**STEP 2:** Enter search values and click the *Search* button to find the request you are looking for.

**STEP 3:** If the search returns more than one request, click on the request you wish to view.

**HINT:** Status values are:

- **CS Shipping, Procurement, CS Receiving:** Processing underway either by Procurement, Central Stores Receiving or Central Stores Shipping.
- **Shipped:** Central Stores has shipped the parcel and the shipment can be tracked through AgileView – Shipments.
D. Track Shipments

HINT: There are two AgileViews:

- Use AgileView – Ship Requests to view shipments that are not yet processed by Central Stores.
- Use AgileView – Shipments to track shipments already processed by Central Stores.

STEP 1: Click on AgileView – Shipments

HINT: If you have closed Internet Explorer, go back to STEPS 1 and 2 in section “A. Login into Agile” of this document.

STEP 2: Enter search values and click search button to find the request you are looking for.

STEP 3: If the search returns more than one request, click on the request you wish to view.
Note: If the shipment is a multi-piece shipment, via UPS, a second step is required from within the UPS window.