# Navigator Troubleshooting Guide

This Troubleshooting Guide provides recommended courses of action for situations commonly encountered during the course of your Navigator Request Engine (NRE) processing.  It is divided into three sections:

- NRE Error Messages and recommended solutions
- Typical Borrower situations and how to deal with them
- Typical Lender situations and how to deal with them

## Error Messages

The following are recommended actions for commonly-encountered problems during the Receiving process.  Each error message is followed by the circumstances under which it is typically encountered, followed by a probable cause and a recommended solution.

**Error Message:  Service failure on Illno <illno> for location <location code>, reason: Other error (not specified). Setting the request to Check Error.**

**Where Encountered:**  Status: Received.  This error message is normally encountered when a Borrower is attempting to mark a Shipped item as Received.

**What NRE is trying to do:** NRE is trying to create a temporary item in the borrowers ILS for the received item.  NRE is also trying to place a hold on this temp item on behalf of the patron.

**Probable Cause:**  The Circulation Gateway returned an error to NRE when attempting to perform an Accept Item action.

**Recommended Solution:**

1. Verify that the Bib and item record were not created in the ILS system.  If this is the case, perform the Receive action again.
2. If the Bib and item record were created in the ILS, place a Hold on the item (if Place Hold has not already been implemented).  The request will then retain the Shipped status until the item is returned to the Lender.
3. If the Bib and item record were created in the ILS, an alternate course of action is to manually remove the Bib and item record from the ILS and perform the Receive action again.

**Notes:**

**Error Message: ILS Circulation System error on Illno <illno> for location <location code>, reason: CORBA::UserException: ServicesException.**

**Where Encountered:** Status: Received. This error message is normally encountered when a Borrower is attempting to mark a Shipped item as Received.

**What NRE is trying to do:** NRE is trying to create a temporary item in the borrowers ILS for the received item. NRE is also trying to place a hold on this temp item on behalf of the patron.

**Probable Cause:** NRE either could not connect to the Circulation Gateway, or the connection to the Circulation Gateway timed out.

**Recommended Solution:**

1. Verify that the Bib and item record were not created in the ILS. If this is the case, perform the Receive action again.
2. If the Bib and item record were created in the ILS, place a Hold on the item (if Place Hold has not already been implemented). The request will then retain the Shipped status until the item is returned to the Lender.
3. If the Bib and item record were created in the ILS, an alternate course of action is to manually remove the Bib and item record from the ILS and perform the Receive action again.

**Notes:**

**Error Message: ILS Circulation System error on Illno <illno> for location <location code>, reason: CORBA::UserException: ServicesException**

**Where Encountered:** Status: Shipped. As a Lender, you are attempting to mark an item as having been Shipped to a borrowing library, but the Circulation Gateway returned the above error message to NRE.

**What NRE is trying to do:** NRE is trying to checkout the shipped item from the Lender's ILS to an institutional borrower that represents the borrowing library.

**Probable Cause:** The Circulation Gateway did not recognize the Shipped action.

**Recommended Solution:** Perform the Shipped action again.

**Notes:**

**Error Message: Handed over for Manual Processing due to error - Circ system error (Other error (not specified).** Setting the request to Check Error. Hold for rota item 0 by Local Bibliographic Record Id Unknown Control Number failed: Item is not known. Request was refused by the circ system.

**Where Encountered:** Status: In Process.  Last Action: Request—Indication.  Acting as a Lender, you are trying to place a Hold on an item that you intend to lend.

**What NRE is trying to do:** NRE is attempting to place a hold in the Lender's ILS for the item being requested, so that later, it can be Shipped to the borrowing library.  This happens automatically when NRE receives a new incoming Request message.

**Probable Cause:** The Circulation Gateway received an error message from the ILS when placing an institutional Hold.

**Recommended Solution:**
1. Verify that the institutional Hold was not created in the ILS.  If it was not, open a Support incident with OCLC Customer Support, providing the Request ID.  (See Notes, below.)
2. If the institutional Hold was placed, perform the Will Supply action on the request in NRE.

**Notes:** There is currently not a way to recover from this situation in NRE.  Contact OCLC Customer Support, by telephone (International: +1-614-793-8682;  USA: 1-800-848-5800), or via e-mail (support@oclc.org ).

**Error Message: Handed over for Manual Processing due to error - Configuration error (No user id for the requester.)**

**Where Encountered:** Status: In Process.  Last Action: Request—Indication.

**What NRE is trying to do:** NRE is attempting to place a hold in the Lender's ILS for the item being requested, so that later, it can be Shipped to the borrowing library.  This happens automatically when NRE receives a new incoming Request message.

**Probable Cause:** NRE is missing the institutional barcode for the requester.  This is normally a configuration issue.

**Recommended Solution:** Contact OCLC Support, requesting them to verify the NRE configuration.  Contact OCLC Customer Support, by telephone (International: +1-614-793-8682;  USA: 1-800-848-5800), or via e-mail (support@oclc.org )

**Notes:**  OCLC Support will re-submit the request once the configuration has been corrected.

**Error Message:  There was not one status.  The status could not be changed.**

**Where Encountered:**  Status: Cancel Pending.  Last Action: Cancel—Indication.

**What NRE is trying to do:** On receipt of a new incoming message or a staff action, NRE is trying to work out what the new status of the request should be, based on the previous status and current event.   This message occurs when NRE either finds more than one possible new state, or cannot find a state table entry for the current status and action.

**Probable Cause:**  The last action applied could not be interpreted by NRE.

**Recommended Solution:**  Contact OCLC Support, requesting them to verify the request.  Contact OCLC Customer Support, by telephone (International:  +1-614-793-8682;  USA:  1-800-848-5800), or via e-mail (support@oclc.org )

**Notes:**

**Error Message:  Service failure on Illno <illno> for location <location code>, reason: Other error (not specified). Setting the request to Check Error.**

**Where Encountered:**  Status: Shipped.  Last Action: Checked In.

**What NRE is trying to do:** NRE is attempting to check-in the current item in the Lender's ILS to show that it has been returned from the Borrowing library.

**Probable Cause:**  The Circulation Gateway returned an error back to NRE when performing a Check In action.

**Recommended Solution:**  Perform the Check In action again.

**Notes:**

**Error Message:  Invalid Service Level**.

**Where Encountered:**  Status: Idle/Check Manual.  Last Action: Request.

**What NRE is trying to do:** When a new request is placed into the system, NRE is trying to find appropriate defaults to apply to this kind of request.  This error suggests that service type or service level being requested has not been configured for.

**Probable Cause:**  No service level was set for the format requested.

**Recommended Solution:**  Contact OCLC Support, request them to verify your NRE configuration.   Contact OCLC Customer Support, by telephone (International:  +1-614-793-8682;  USA:  1-800-848-5800), or via e-mail (support@oclc.org ).

Re-submit request after service level is added.

**Notes:**

**Error Message:  Handed over for Manual Processing due to error**.

**Where Encountered:**  Status:  In Process (or, New Requests).  Circulation system error.  Attempt to authenticate user was unsuccessful.

**Probable Cause:**  Reason for the failure is unspecified.

**Recommended Solution:**  Contact OCLC Support, request them to verify user authentication.  Contact OCLC Customer Support, by telephone (International:  +1-614-793-8682;  USA:  1-800-848-5800), or via e-mail (support@oclc.org ).

**Notes:**

**Error Message: Handed over for Manual Processing due to error.  Circ system error.**

**Where Encountered:**  Status: New Requests.

**Probable Cause:**   Local Bibliographic Record ID unknown; OCLC control number failed.

**Recommended Solution:**

**Notes:**

# Commonly-encountered Borrower Situations
# How To Deal with Them

The following are situations that commonly occur in Navigator when you are the borrowing library.

## What happens when no locations are found on the lender string?

If the current potential lending library replies that an item cannot be supplied, your request will automatically be forwarded to the next library on the lender string.  When no library within the consortium can fill your request, the request may be sent into your ILLiad system or to WorldCat Resource Sharing for further management.

If the request is sent to your ILLiad system, the NRE request will be completed and will no longer be on your Work Queue.

If the request is sent to WorldCat Resource Sharing, it will continue to be managed in NRE. WorldCat Resource Sharing will send messages to NRE, updating the request as it progresses through the WorldCat lenders.  The interface between NRE and WorldCat Resource Sharing is ISO-ILL.

## Why do requests fail to be sent to a Lender?

Occasionally, a request will be held for staff review because of some condition preventing it from being automatically forwarded to the first Lender.  The most common reasons for this are:

- The requested item is held locally
- No locations could be found for the item within the consortium
- The request is a duplicate

Requests held for staff review are counted in the Idle/Check Manual category of the Borrower Work Queue.

| Idle / Check Manual | 2 |
| --- | --- |

For each of these requests, click on the **Details** link to view the reason why the request cannot progress through the normal cycle.



When you click on the **Details** link, the Request Details screen that displays provides a wealth of information about the request. To determine why the request was not sent on to a lender, scroll to the bottom of the Request Details display, to the Log Messages:

## How do I terminate a request?

You can terminate a request as long as the request has not been received. Terminating a request cancels the request with the current responder and does not forward the request to the next location.

Retrieve the item to be terminated from a Request Search or the Work Queue and select **Terminate Request** from the drop-down list of actions:
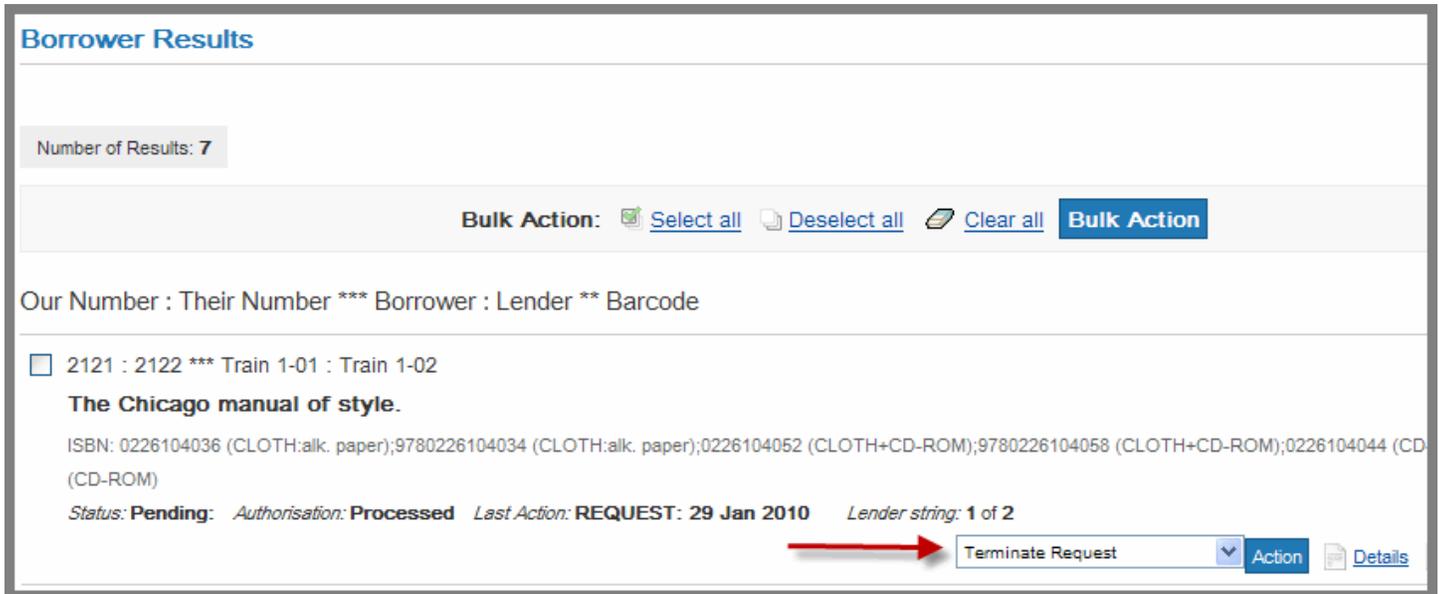


Once you select **Terminate Request**, you can use the screen that follows to indicate a reason for the termination:

## When should a request be completed (removed from NRE)?

Requests that should not be progressed any further can be removed from the Borrower Work Queue (and NRE) by performing the **Complete** action.  The following types of requests are candidates for the Complete action:

- Request that have been sitting Idle and can be supplied locally
- Idle requests that duplicate an active request for the same title from the same patron
- Any request that you are certain has reached the end of its lifecycle

**Note:**  You should not **Complete** requests if their status is Pending, because the lending library may still supply the item.  Requests should only be Completed if you are sure no further action will be taken on them.

The Complete action is available from the drop-down menu for requests that meet the criteria for completion:

## When should I Cancel a request?

The Cancel action should only be used to cancel the request with the current responder location and move the request on to the next location in the lender string. You may want to do this, for example, if the current responder has not taken any action on the request. (To cancel a request entirely, use the Terminate action. See previous page.)

The Cancel action:
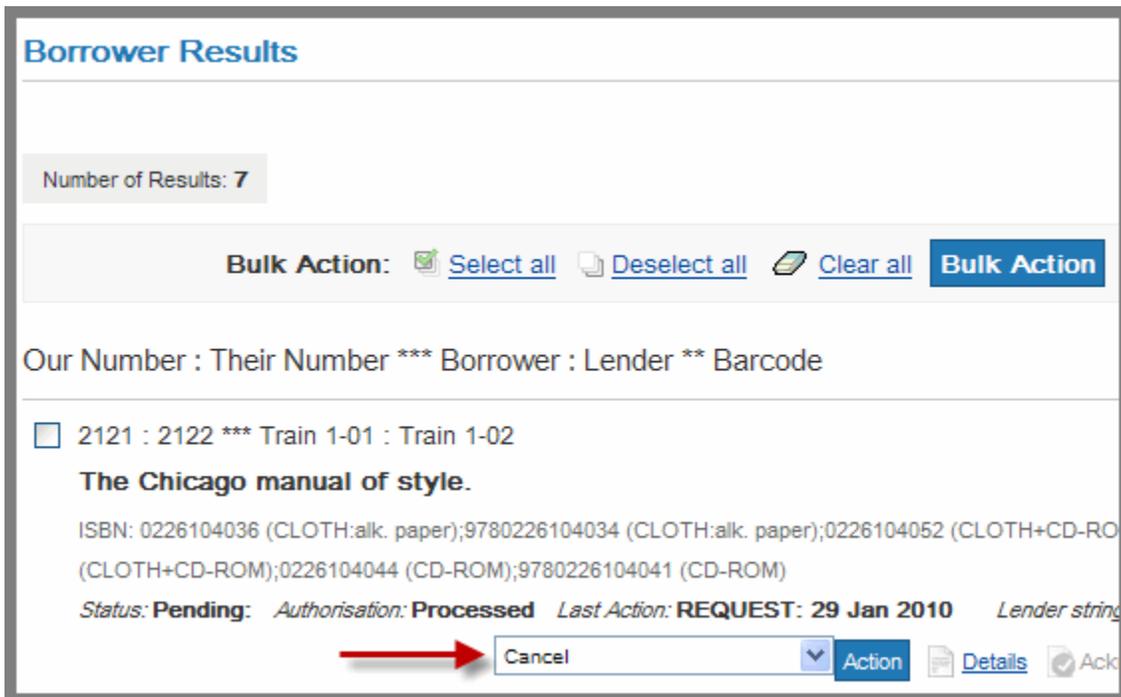


## How do I send a message to my patron about a request?

There may be times when you need to send information to your patron concerning a request. For example, the patron may need the item by a certain date and you want to inform the patron of the progress of the request. In those cases, the Send User Alert option will be available from the drop-down menu:

Once you click the [Action] button, the screen that displays will enable you to send the message to your patron:

**Request**

**Action: Send User Alert**

Send   Reset

**Request Details**
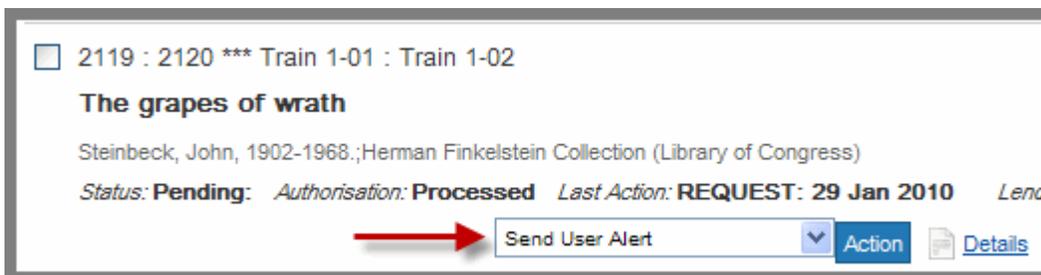
| | |
|---|---|
| **Our Number** | 2119 |
| **Their Number** | 2120 |
| **Status** | Pending |
| **Title** | The grapes of wrath |
| **Author** | Steinbeck, John, 1902-1968.;Herman Finkelstein Collection (Library of Congress) |
| **Patron Name** | Staff Train 1-01 |

**Patron Email address**

**Service Details**

| | |
|---|---|
| **Service Type 1** | Loan |

**Notes**

**Patron Note**   Your book is expected to be available in 1 week.

**Private Note**

Send   Reset

# Commonly-encountered Lender Situations
# How To Deal with Them

The following are situations that commonly occur in Navigator when you are the lending library.

## The Will Supply message

If your library has integrated your circulation system with Navigator, NRE will automatically search your catalog and respond with the **Will Supply** message if the item is in your catalog, on the shelf, and available.

If you have not enabled circulation integration for your library, you can send the Will Supply message manually when you intend to provide a requested item but cannot ship it immediately. The Will Supply message is available in those cases from the drop-down menu:
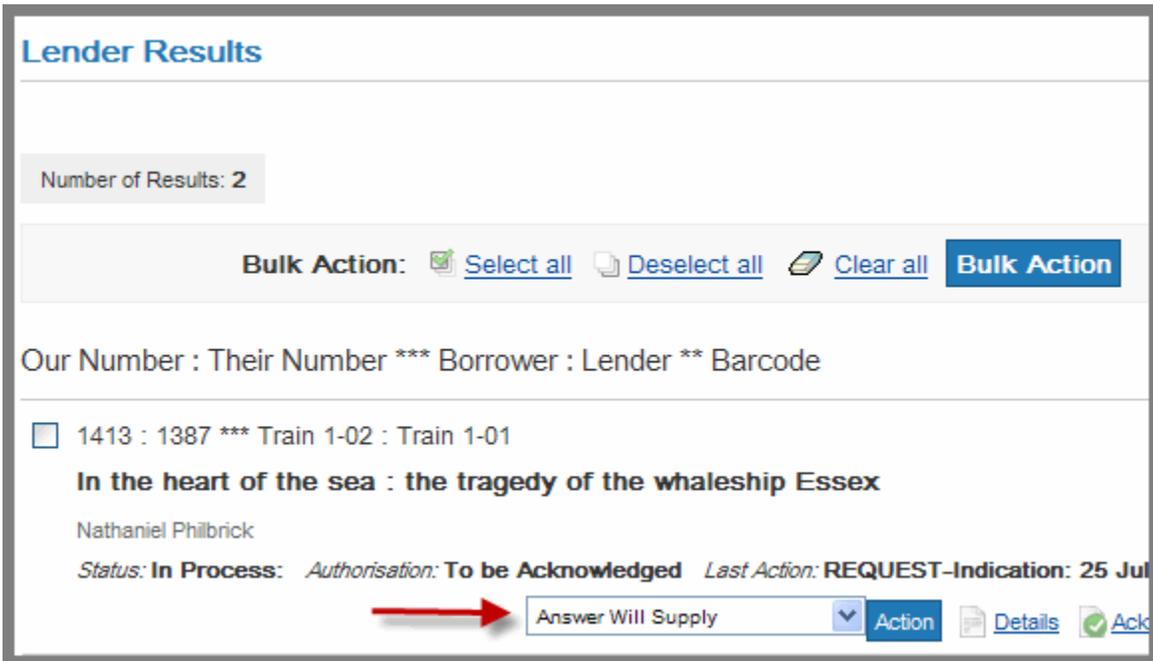


On the following screen, you can provide a reason (as needed) why the item cannot be supplied immediately:
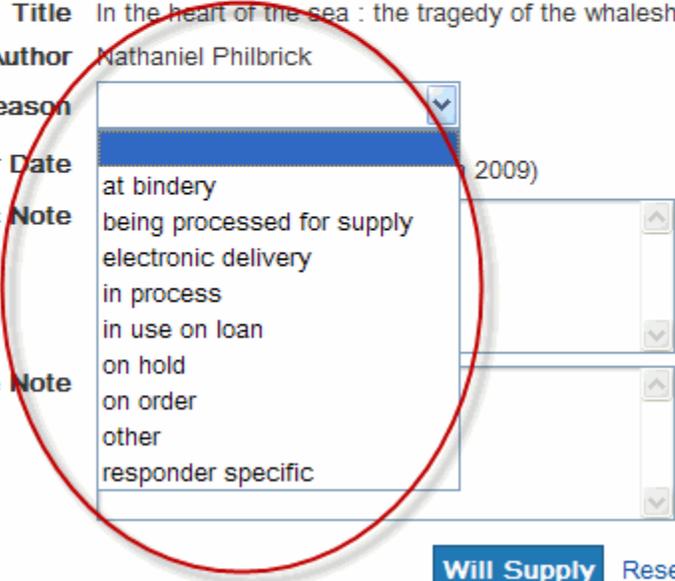
## Handling Renewal requests

If you have any items in the Renewal Requested section of the Lender Work Queue, you should update the requests to let the borrowing libraries know whether or not you agree to renew the items  by selecting either the Renew Answer – Yes or Renew Answer – No Action:

If you take the Renew Answer-Yes action, you should let the Borrower know the new Due Date. (The circulation record must be updated manually.)

## Recalling an item before the Due Date

If you have lent an item through consortial borrowing but need it returned before the due date, you may recall it.  Search for the item (via the Work Queue or a Request Search) that should be recalled and select the Recall action.
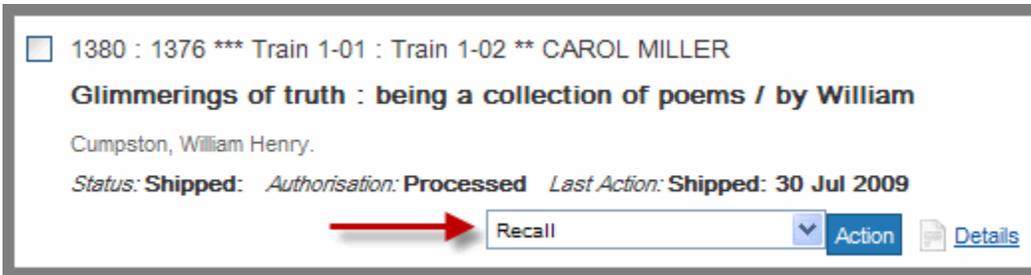
## Responding to a Cancel request

If a borrowing library wishes to cancel a request for which you are the current potential lender, you need to inform the borrowing library whether the request can be cancelled.

The request will be in the **Cancel Requested** section of the Lender Work Queue.



If you agree to the cancellation, you should respond Cancel Reply-Yes.  If the request cannot be cancelled because it has already been shipped or for other reasons, you should respond Cancel Reply – No.
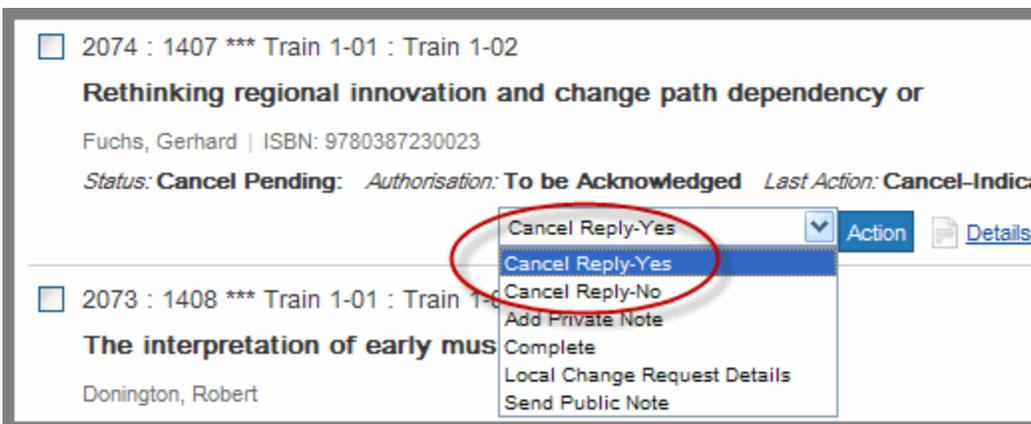


## Setting conditions on a loan

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If you need to set conditions on a loan before shipping an item to a borrowing library, select the Answer Conditional action from the drop-down list:



On the following screen, you can select a Reason for the conditional loan: