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Texas Navigator Q&A

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Texas WorldCat Navigator Q&A Session

Phone #: 1-877-668-4490

Meeting #: 716 157 042

You will be muted upon entry. If you are unable to dial in for audio you may listen on your computer speakers. To join, click the "Audio" menu in the upper left Webex window, and then click "Audio Conference". A popup will open; click on "Use computer for audio".

- If you are joining the audio conference through speakers, please use the chat option to ask questions.

Agenda

- Where to locate training and documentation
- Some answers to Frequently Asked Questions
- Time for Open Q&A with Ralph, Jenny, and Sara

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Training and Documentation

- Navigator training recordings and print resources are available:

  - on the TSLAC website: https://www.tsl.texas.gov/landing/ill.html
  - On the Texas Resource Sharing Blog (Under "How to.."): https://www.tsl.texas.gov/texshare/newsletter/resourcesharingprojects/
  - On OCLC's website: https://www.oclc.org/support/services/navigator.en.html
  - OCLC Data Sync: http://www.oclc.org/support/services/collection-manager/documentation/data-sync.en.html

Navigator Training Opportunities

- Posted on the Texas Resource Sharing Blog calendar: https://www.tsl.texas.gov/texshare/newsletter/resourcesharingprojects/

- Subscribe to the Navigator ILL mailing list: https://lists.tsl.state.tx.us/mailman/listinfo/illnavigator

- Posted on the NRE login page: https://texas.vdxhost.com/nre

For specific questions

- To Contact TSLAC, Sara Hayes, TSLAC's Statewide Interlibrary Loan Coordinator – shayes@tsl.texas.gov
- To Contact OCLC, use the "Report a Problem" link in NRE or contact support (support@oclc.org)

How can we select a specific library to borrow from?

- Navigator is designed to create the lender string (rota) for you without your intervention. It already takes into account load balancing and geographic distance from you.
- This is not a recommended workflow
- If placing the request from NRE, library staff can add libraries to the lender string by OCLC symbol. Any lenders added must own the item and be in the NRE system.

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Integration with WorldShare ILL

- Issues when audio book requests go from Navigator to WSILL (format goes into WSILL as book, rather than audio book)

- No current fix – workaround is to put the desired format in your notes field

- OCLC is aware of this issue and is investigating the most effective means of resolving it.

Can Navigator let us know when a book has already been requested so a second request is not made?

- If a library has circulation interoperability (via NCIP), the circ system will place a hold on the item. The next request for that item will show there are no more items available.

- If no circ interops, the item will always show as available until the staff manually place the reserve on the item in the circ system.

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Can we go back and change our status on a supply or non-supply?

- If you answered "will supply" (or your circulation interoperability does so automatically), you can go to the request and change the action to "Answer non-supply" and send the request to the next library in the lender string.

- Once you have responded "non supply" the request is completed and cannot be changed – it has already been sent to the next library.

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Dealing with libraries that are too slow to respond

- Can we move along or cancel a request with a library when they keep it for more than 5 business days?

- An upgraded version of NRE will allow "Cancel Now" on requests that are internal to Navigator (and have not gone out to WSILL).

- You will need to continue to use "Terminate" to cancel the request with the lender and wait for a response before it will move on.

Copy requests (Articles)

- Can there be sections in the Work Queue for Copy requests?
  - Since not all libraries supply articles via Navigator, individual libraries should use the "Report a Problem" link in NRE, and we can add a Shipped Articles queue on the borrower side to your work queue.
- Can we use Article Exchange?
  - NRE 9.1 will have this ability

Searching for magazine requests

- If requesting an issue of a magazine or periodical, borrowers should include the volume number and article title and pages. If your library receives a borrowing request and you do not have this issue, please answer "non-supply" so it goes to the next library.

- Libraries can scan or copy articles and mail them.

- You can also search for the item in the Texas Group Catalog, find the OCLC number in the record, and then search by that in NRE to pull up that exact item only.

User records are not linking up with requests

- If you do not allow your patrons to place their own requests, you will need to link the accounts manually.

- https://www.oclc.org/content/dam/support/navigator/documentation/using/Navigator_patron_requests.pdf

We need an easier way to look up movies

- Search the item in the Texas Group Catalog, locate the OCLC number in the item record you want, and then search by that number to bring up the exact item for you to request.

Is there an easy way to search older requests in the system to find completed requests?

- Remember that Navigator does not "delete" requests. They are completed and only available if you search for them using:
  - The standard search by my ILL Number
  - The Advanced search and checking the "Include Completed Requests" box.
  - Documentation is available here: https://www.oclc.org/content/dam/support/navigator/documentation/using/Navigator_quick_reference_searching.pdf

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Can OCLC work closer with other ILS vendors for circulation integration?

- We are currently testing with both Koha and Atriuum
- In Texas we also support this with Biblionix, Sirsi, III, and Polaris

Courier

- Can the address field require an indication of whether or not the borrowing library is part of the courier service?

  - Libraries on the courier should have the hub city and location number (ex: 83-AUS) in the "Org, Dept, Bldg,etc" line of their address information
  - Libraries can edit their addresses by selecting "Locations" on the left and then "Edit Own" at the top of the screen in NRE.
  - To print the courier code on workflow reports, NRE support will need to make a change.

Label Printing Issues

- Labels can be misaligned and print outside the edges of the labels

- We want to pick the print position on our Avery label when printing received labels.

If data prints off the label, use report a problem and let us know the batch date. Our only option is to request the data printed to stop the misalignment. Adding the ability to select the starting label position would require development.

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Data Sync Questions

- https://www.tsl.texas.gov/texshare/newsletter/resourcesharingprojects/?page_id=2199

- Where are you getting stuck? OCLC support can help (1-800-848-5800 or support@oclc.org)

- Webinars have been recorded and documentation is available at the above link as well.

Time for your Questions

Need help after the session?

1. Click the "Report a Problem" link in the NRE staff interface
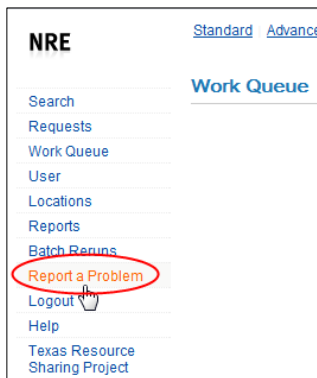
2. Contact Sara Hayes at TSLAC (shayes@tsl.tx.gov)

3. Call OCLC Support at 1-800-848-5800