

## **CARL Training**

### **Frequently Asked Questions**

#### **General**

Q What is the difference between CARL.X and CARL.Connect?

A CARL.X is the older Windows client that is equivalent to SirsiDynix Workflows. A client must be installed on each workstation that accesses the server. To begin, TLN will use CARL.X for circulation, serials, and acquisitions. CARL.Connect is the name of the overall web based product and it has several pieces. CARL.Connect Discovery is the catalog and TLN will use it on day one. CARL.Connect Item Maintenance is where libraries will add new items, discard items, mark items missing, etc, and TLN staff will use it as soon as we are live. CARL.Connect Circulation will be available for libraries to use later this summer for outreach once they have had training. Eventually the CARL.Connect products will replace all of the CARL.X products, but things are still in transition.

#### **Patrons**

Q Where will we enter the parent name and DL number in minor patron records?

A When entering a new patron, if you click on “which address” you will see “sponsor” in the dropdown menu. Click on that and a sponsor name and address section will open. The parent’s name and address should be entered here. If you keep the parent’s drivers license number, you should create a standard, free text note for that information.

Q In the patron information screen, are the histories retained indefinitely until they are manually cleared?

A TLN will clear the history. I believe we will keep it two years, just as we currently do.

Q In the documentation, there is a Charge History tab in patron information. It’s not showing in the client we are using. Is this dependent on the patron opting-in to this feature on their end?

A We will not keep charge history on the patron's record because of privacy issues. If the patron opts in to keep loan history, it can only be seen by the patron when he is logged in to "my account." Staff will not see the loan history.

Q Does the alt ID field need to be unique?

A Yes. This is why we are recommending that the parent's drivers license number be entered in the note field on the child's record.

Q Can a patron have more than one email address?

A No. CARL only accepts one email address. If you have entered more than one in the email address field, only the first email address will migrate.

Q Can we see the PIN in the patron record?

A No, you cannot see the PIN but you can change the PIN if the patron has forgotten it.

Q The patron information screen is open and I clicked into charge but patron didn't bridge over?

A If you click into charge from patron information, click on arrow next to patron barcode at the top and then click on the barcode that appears and the patron will be there.

## **Circulation**

Q What does "charge on charge" do? We were trying to see if the record of the transaction appears on the first person's card but it seems to have been erased.

A A charge on charge occurs when an item has not been properly discharged from one patron's record and is checked out to a second patron. The first patron's record is cleared and if the item was overdue, no fines are posted to the account. The information is erased from the first patrons' record just as a discharge would be.

Q Will we have a mobile circulation solution for outreach?

A Yes there is a mobile product called CARL.Connect Circulation that works on a tablet. We thought it was too much to train on both systems before we go live so we are concentrating on CARL.X now, but we hope to start training later this summer.

Q Would we be able to install CARL.X on a laptop and use it out of the building?

A No. CARL.X needs to be within your IP range to authenticate with the server.

### **Hold**

Q If a patron doesn't pick up a hold on time and it gets sent back to the owning library, will this show somewhere in the patron's history tabs?

A When you take an expired hold off the hold shelf and return it, you can choose to send a notice to the patron (item not picked up) and that will appear in their notice history.

### **Fines**

Q In the training video, there is a "no fines" option in Return. We aren't seeing this in the training version of the client. Will we have this option in Return?

A We will not have this option. You can backdate the return date to avoid posting fines.

### **Item Maintenance**

Q Will there be presets for adding items in CARL.Connect? For example, can I set the Media Code for a session?

A You cannot create presets for an item maintenance session. CARL has made a note that there is interest in doing this so future development is possible.

## **Discovery**

Q If patrons create lists using Discovery, will these lists show up in the Wishlist data in CARL.X?

A Lists in Discovery will not transfer to CARL.X. Wishlist is a separate feature designed for homebound patrons. If you have a patron that only reads a certain genre (cozy mysteries for example) you can add new titles to the patron's wishlist as they arrive, then place holds and deliver them later. CARL will keep track of what books to take to the patron and staff won't have to wonder if the patron already got the item. The item disappears from the wishlist as soon as it is checked out to the patron and no loan history is kept.

Q Does the CARL BID appear anywhere in the Discovery catalog?

A The CARL BID is in the 910 field in the MARC display option in the detail record display.

Q Can the EZ Username and Password be used to log in to SAM or Envisionware?

A The EZ Username and Password can only be used to log in to the CARL "My Account" feature. Patrons will still need to use library card number and PIN for SAM, Envisionware, Hoopla, Overdrive and other products requiring authentication.

## **Migration**

Q Will patrons have access to third party products like Overdrive, Hoopla, and Zinio during the migration weekend?

A Yes, patrons will have access to third party products during the migration using the same type of authentication that is used on holidays when Symphony is down.