CARL Training Suggestions

All training must be done on the test server and test database.  Libraries cannot use the live system or the production server for staff training.  The test system will continue to be available for training after our go live date.

Assemble a cart of items to be discarded (or items with minimal checkouts) for staff to practice on.  Be sure to include short loan items (if you have them) and examples of any materials that require special handling.

Include several patron cards.  Staff will begin by adding new users to the test database, and these cards will be used to practice checkouts, holds, etc.

Begin by training at least two key staff members who will then work with the rest of the circulation staff to practice.  Have staff work in groups of 2-3 with the patrons and items on the test cart.

REMINDER:  There are CARL.X training videos on the Shared System Migration page on the TLN website.  They can be found here:

http://tln.lib.mi.us/dept/shared-automation/migration/

Encourage your staff to watch them before training begins.

Suggestions for Training

- Create a new library card (consider using a last name like "test" or "practice" so the test patrons can be quickly identified)
- Check out several items (of various types) to the new card
- Change the due date on one of the items to add three more days
- Change the due date on several items to tomorrow and leave on cart until they are several days overdue
- Add a note to a patron record
- Change a patron's address
- Renew an expired card
- Create a manual fine on a patron record
- Place three holds on a patron card. (Use items from the cart that are already checked out.)
- Renew three items, one with no more renewals allowed
- Discharge several items, including at least one with holds and another that is overdue
- Clear the fines for the overdue items
- Discharge a damaged item and create a bill
- Accept a partial payment for overdue items/bills
- Waive a fine
- Check out items to a patron who owes fines
- Place a hold for a patron who owes fines
- Check out an item on hold to the patron who placed the hold
- Check out an item on hold being picked up by someone else for the patron who placed the hold
- Check out an item with a hold for another patron that was found on the shelf (override the hold request)
- Mark an item "missing"
- Mark an item "claims returned"
- Mark an item "never had"

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