

GLOSSARY—SirsiDynix to CARL.X

SirsiDynix

User
Display User
User ID
User Category
User Category 4
User Profile
Demographics
Delinquent
Blocked or Barred
Pay Fine
Paid
Unpaid
Credit Card
Claims Lost
Courtesy Notice
Discharge
Hold
Hold Expires date
Pull On Shelf Hold List
Item Type
Title Control Number
Shadowed
Not in Catalog
Library
Sidebar/Left Column

CARL.X

Patron
Patron Information
Patron Barcode
User Defined Field (UDF)
Local User Type
Patron Type
Statistics
Soft Block
Hard Block
Payments or Negotiate
Credit
Debit
Cash Card
Go Lost
Coming Due Notice
Return
Request or Hold
NNA date (not needed after)
Router List
Media Code
BID (Bibliographic Identifier)
Suppressed
Not Converted
Branch
Outlook Bar

Patron Library or Branch

SirsiDynix refers to each shared system building as a library and CARL.X refers to each building as a branch.

SirsiDynix only lists one library, and that is the library that “owns” the patron, the patron’s current registration or home library for statistical purposes.

CARL.X tracks a number of different branches (libraries). The most important for statistical purposes is the Home Library, which is a User Defined Field found in the Statistics area at the bottom of the patron information screen. This is the library that serves the community where the patron lives and pays property taxes and it will be used to track circulation statistics. When a patron moves from one shared system community to another and is issued a replacement card from his new home library, it is important to remember to change the Home Library to the library issuing the new card.

There is also a branch listed at the top of the patron information screen, between the expiration date and patron type. Initially this will match the home library at the bottom of the screen, but this is the patron’s preferred branch and the patron can change it in the “My Account” feature of the online catalog. This becomes the default branch for hold pickup, and when the patron is logged in, the catalog view will be the preferred branch. Library staff should not change the preferred branch unless the patron requests it.

There is a history tab on the patron information screen, and if opened, a second set of tabs will appear. The Statistics tab will display three more branches. The Registered Branch is the library that originally issued the card and it will never change, even if the patron moves several times. The Edited Branch lists the library that last changed any information on the patron registration screen, and the Activity Branch is the last library the patron used. The statistics tab also tracks self-serve activity for patrons who access downloadable resources and databases but rarely visit the library in person.