

Questions for Circ Services Meeting 9/13/2018

PATRONS

- Is there a way to see the patron's PIN?

No there is not. You can change the patron's PIN in CARL.X without knowing the current PIN. Leave the old PIN field blank, type new PIN in new PIN, type the same number in confirmation, and use your library's login password to override.

- Is there a way to customize the number of notices a patron receives?

No. Notices are sent via email if available, and then via phone. Print notices are only sent for the final bills if there is no email or phone or both fail. Text messages are sent in addition to email or phone if the patron has opted in but the patron will not receive both email and phone notifications. You can see the notices sent and delivery method in the notice history tab in the patron record. If the patron has received multiple notices for the same item, open a help desk ticket and include the patron barcode. Remind the patron that if more than one person in the household has items checked out and due on the same day, the system will email or call each patron with the coming due notices.

- Is there a way to change the default sort of patron charges?

There is no default sort. Clicking on the header for any column will sort the patron charges by that column. There is no way to save that sort order.

- Can we see a patron's previous card number or see how many cards have been issued?

No.

- If a child's phone number is placed in the primary address and the parent's phone number is placed in the secondary address, which number will receive notifications?

"Which address" determines the address and phone number that will be used by the system for notifications. However, the parent's

address and phone number should be placed in the “sponsor” address not the secondary address. The parent’s information can also be placed in a note field and this will allow the child’s information to be used for notifications.

- How can a patron be billed for a damaged item after the item has been discharged?

Go to Patron Summary and click the Manual Fine box at the bottom of the screen. A window will pop up. Fill in fine amount, put title and author in description, and add item barcode in the item number field, and click “write fine.” You can add a standard note with a more detailed description of the damage if you wish.

If you need to find the name of the previous patron, use the “transaction history” tab on the item detail window.

- What is the purpose of the cell phone carrier information and why must I fill it out?

The cell phone carrier information is needed for CARL to send text messages to patrons for hold pickup and coming due notices.

The drop down list of cell phone carriers on the patron information page has been updated. The top alphabetical list includes all of the commonly used carriers in the shared system libraries. The second alphabetical list contains the lesser used carriers. Carriers that were not used by any of our patrons have been removed from the list.

If you have a patron with a carrier that is not on either list, please open a help desk ticket so TLN can add the carrier to the list. Include the carrier and the cell phone number in your ticket.

We have had questions about why there is more than one option for some of the carriers (for example Verizon and Verizon MMS). This is because there are so many different devices available and different devices accept messages differently. Some can only accept plain text and others accept HTML format (MMS). The most common options are listed first, and we suggest that you start with that choice, and if the patron does not receive their text messages, then switch to one of the other options for that carrier.

DAMAGED ITEMS

- See separately distributed document for instructions on handling damaged items with holds.
- Why can't we create patron cards for things like damaged, missing, etc like we did before?

CARL works differently. Damaged, missing, and withdrawn are statuses in CARL, and their programs designed to remove missing, damaged, and withdrawn items work with status changes to identify these items.

If you create a card for "missing" or "damaged" and check items out to it, the items will age through the regular overdue process and nothing else will happen to them. At seven days the first notice will be triggered and at 14 days, the card will be billed for the lost item. Soon you will end up with a blocked card and the items will show up in the catalog as overdue. Nothing else will ever happen to them unless staff manually remove them.

When you use the damaged or missing status, the item is suppressed in discovery so patrons won't see it. You will be able to run reports of missing or damaged items to search the shelves and change their statuses to withdrawn if necessary, and TLN will be able to delete them if they are still in the system after the recommended removal date.

DISCOVERY CATALOG

- Will PayPal ever be a payment option?

CARL's payment method is Authorize.net. PayPal is not an available option.

- Will there be a MelCat link in the catalog?

A MelCat link will be created at a later date, but TLN staff is working on higher priority items right now.

OTHER ISSUES

- The CARL production ini file is at the bottom of the list. Is there a way to move it to the top of the list?

Putting a zero in front of the file name will move it to the top of the list.

- Will there be improvements to the Router list in the future?

CARL is not planning major changes to the CARL.X Router list. CARL.Connect Circulation's Fill List combines the title, item, and issue router lists into a single list and it includes item barcode.

- When will we have access to reports?

Libraries will receive access to reports when they have completed training, and they hope to begin reports training later this fall. In the meantime, if you would like reports of damaged items, items in transit, missing items, etc, please open a help desk ticket and TLN will run the report for you.