

## CARL Glossary

A major challenge when changing from one ILS to another is to understand terminologies. We've created this glossary to help navigate some of the language that is different or new as we move from Sierra to CARL.

**Ad-hoc Reports:** Reports not supported by the "canned reports" available in the Admin and Staff clients. These require directly accessing the database using SQL queries which will need to be done by OWLSnet Staff.

**Administration:** The management of database functions. This will be done by OWLS staff.

**Alt PO:** An alternate field used to search a purchase order.

**Archive:** In Acquisitions, the archiving function allows for archiving of Invoices and Orders, which removes them from search results in Acquisitions. These cannot be un-archived and once they are archived the only way to access them is by calling OWLS.

**Area:** A one-character code (alpha or numeric) in Acquisitions' Funds that the system will use to group funds by area for reports.

**Available Now (in InfoSoup):** A filter that allows searching for all available items in OWLSnet.

**Batch Load:** A way to import many records into the database at one time. Often bibliographic records are batch loaded. CARL•X will also batch load vendor bibs. Patron records could be batch loaded as well. Vendor records, such as those from Ingram, Baker & Taylor, Midwest Tape, Overdrive, RBdigital, and Hoopla records will all be batch loaded by libraries or system staff.

**Bib Search:** In CARL•Connect Staff, Bib Search will take you to a staff view of InfoSoup to search records by title, ISBN, author, etc. Select Back will put it back in the item maintenance view.

**BID:** This is the CARL Bibliographic Identifier, a unique number (called a "primary key" in relational databases) for each bib record. This would be like the Sierra bib record numbers that start with "b."

**Blocked Word Manager:** A way to block offensive or inappropriate words from patron reviews or tags (neither are currently enabled for our implementation). This does not apply to bibliographic records.

**Branch:** This means "library location." Each location and each branch will be considered a "branch" in CARL. There will be grouping for consolidated counties for reporting purposes.

**Branch Code:** Each library's code. This will replace the 3-letter van code within the database for statistical purposes.

**Canned Reports:** Pre-designed reports in the Admin and Staff clients. Most reports will be available as these pre-designed reports.

**Care of Address:** An alternate address for the patron record. This could include a permanent address or a seasonal address depending on local practice.

**CARL Connect Discovery:** The online, patron-facing catalog. We will continue to call this “InfoSoup.”

**CARL Connect Staff:** The online staff-facing platform. Many functions can be done using this platform, including circulation and item features.

**CARL•X:** The application-based client. This is specific to a workstation and will be used for advanced functions such as acquisitions, cataloging, reports and supervisory duties.

**Carousel:** A rotating slideshow of items in the online catalog.

**Charge:** The function used to checkout materials to patrons. “Checkout” = Charge.

**Charge on Charge:** When an item is checked out to a patron and a different patron tries to check it out. CARL•X can complete a Charge-on-Charge which would return the item from the original patron and then checks the item out to the new patron, without having to leave the Charge (checkout) function. Currently we have set the system to prompt asking if an overdue fine should post.

**Checkin Notes:** An alert that displays when an items is checked in via Circulation.

**Claims Never Had:** An item that has been checked out to a patron, but they claim they’ve never checked it out. The item is then removed from the patron’s account but is available for reporting purposes.

**Claims Returned:** A Claims Returned can be placed on an item when the item is checked out to a patron account, and the patron reports that the item has been returned. The Claims Returned flag on the item causes the item to appear on reports for shelf checks. The item remains on the patron account with indicators reflecting the Claims Returned status of the item.

**Class:** A one-character code (alpha or numeric) in Acquisitions’ Funds that the system will use to group funds by class for reports.

**Chronology and Enumeration:** This is a section of the item record where we can put volume, issue, and date information for items that continue in a series or subscription. In Sierra we would use the volume field for these types of materials that cataloging calls “serials.” Chronology refers to the date and enumeration refers to the issue/volume number. If these are standardized, patrons can place holds against the same volume or issue across the entire system instead of needing to choose a specific item. This will be a significant change from Sierra, and it might take us several months before we get our data cleaned up enough to be

useful; however, once we do it will offer greater flexibility and a streamlined experience for patrons and staff.

**Clone:** Copies an existing subscription to another subscription in Serials. This copies the entire grid, not just expected issues.

**Committed:** the total amount of funds encumbered plus the spent amount.

**Companion Searcher:** also called Searcher. This is the tool used to search the bibliographic database in the CARL•X clients. Companion Searcher can be used to search our OWLSnet bibliographic database and SkyRiver.

**Coden:** A coden used for scientific journals similar to ISBN or ISSN. This will likely not be used often (or ever).

**Configuration:** The way a system is arranged that affects the way it looks and functions. This is controlled by settings in Administration.

**Configuration List:** A list in Discovery that will display in a carousel on InfoSoup.

**Crystal Reports:** A report output that allows for viewing, not editing. These reports will have an .rpt extension. Exporting in Excel has more customization options and data than Crystal Reports.

**Delta:** A method of communicating changes from the database to the online catalog. CARL•X and CARL•Connect Staff are databases built with different technology than CARL•Connect Discovery, so CARL•Connect Discovery/InfoSoup will search for changes every 15 minutes.

**Distribution:** A way to order the same title for various locations.

- **Profile:** A template set up to distribute units of an order. This is helpful if the distribution is for a large number of units with a standard distribution.

**Dummy item:** An item created to allow patrons to place holds on a title on order in the online catalog. If a dummy item is deleted, it removes the “on order” record patrons see online. However, deleting the dummy item does not impact the order even though the dummy item number is the same as the order number.

**End of Claims Cycle:** When an item has reached the last interval of Claims Return or Claims Never Had process and staff cannot locate the item after being searched for, the item can now be the patron’s responsibility and the status can be changed to Lost.

**External Funds:** The name or number used for transmitting to external accounting agencies or departments. Not required.

**EZ Username and Password:** Login credentials a patron chooses on InfoSoup to access their patron account. This is not tied to the PIN assigned by the library during registration. Staff

cannot look up this information or change it for a patron. This cannot be used to log in to public computers, Overdrive, or other library services.

**Fill List:** Pick list or paging list.

- **Fill With:** Allows you to assign an item to fill a hold if there is more than one item available.
- **Check In:** Triggers the hold and puts it into transit or on the hold shelf.
- **Found:** Connects the items picked to the hold, but doesn't put the item in transit or on the hold shelf.

**Flex grid:** Results view. It is called a flex grid because you can sort by any heading and export the results by right-clicking.

**Format:** This is a term based on certain characteristics in a MARC record to identify the format. OWLSnet has come up with some rules in additions to the ones already created by TLC to help library staff search in the CARL•X desktop client.

**FRBR View:** Refers to the way titles with the same intellectual content are grouped together on InfoSoup. Books and movies are not typically considered the same intellectual content so they are not grouped together.

**Free-text Note:** Notes that can be added to a patron record but are NOT searchable.

**FTP:** File Transfer Protocol is a way to transfer files from one computer to another. We will use FTP to upload bibliographic records to the TLC servers to batch load. I recommend FileZilla, but any FTP software will do. It's really easy and not scary at all. You'll do great.

**Grid:** Comparable to a card in Sierra, this is how the system predicts and maintains issues in Serials.

- **Copy:** Once created or spun, grids can be copied to other libraries' subscriptions.
- **Create:** Creates a new subscription grid.
- **Delete:** Deletes a subscription grid. This will be done when all the issues from a grid are deleted, such as at the end of the year when old issues are discarded.
- **Extend:** Adds to the existing grid. Similar to "add a box" in Sierra.
- **Spin:** Creates the following year's grid in Serials. This is comparable to "extapolate" in Sierra, which copies the prediction pattern for the next year.

**Group:** A one-character code (alpha or numeric) in Acquisitions' Funds that the system will use to group funds for reports.

**Grow Up Age:** A notification to alert staff that a juvenile patron is about to become an adult. For our system it is 17 going on 18.

**GUID:** what Sierra calls the patron number or p number

**In Transit:** In Transit items are items that are in the delivery processes between two libraries. In Transit items are being returned to the items' home library for re-shelving. This does not include items In Transit to fill holds at non-owning libraries.

**Institution:** In the context of this database, Institution means OWLSnet (all of us).

**Instbit:** An internal code TLC uses. Not of functional use to OWLSnet.

**Item Number:** The barcode assigned in the item record.

**Holds:** CARL has three different types of holds, which are:

- **Institution Holds:** these are title- or (also what we currently call "bib") level holds. Institution/Title Holds will be filled by any item attached to the bib record. This is the default or preferred hold type in Sierra and will continue to be the preferred hold type in CARL.
- **Item Holds:** This type of hold can only be filled with a specific item. You can use this type of hold to recall an item for internal purposes, such as it is damaged, needs changes, or should be withdrawn. In Sierra, an "item hold" is also used to describe holds place on serial or volume records, such as magazines or graphic novels, what a particular issue or volume is requested. In CARL, these will be Issue Holds.
- **Issue Holds:** Once we get Chronology and Enumeration set up, magazines, graphic novels, travel guides, or anything that has a volume or specific issue can have an issue-level hold placed against it. This means CARL will search all the available copies of a volume or issue to fill holds, not just one item. For example, if a patron wants Volume 3 of *Phoebe and Her Unicorn*, they can create an issue-level hold and any available *Phoebe and Her Unicorn* Volume 3 in the system can be paged and fill the hold.

**Indexing:** The fields the database and InfoSoup are pulling to retrieve data.

**Ini File:** An initialization file used when installing the CARL•X client on a desktop. The ini files will be specific to each branch when the production databases are installed.

**Intellectual Identifier (IID):** A unique number that links bib records with the same intellectual content together to form the FRBR view in InfoSoup. The system is comparing the Title and Author fields in the bib records.

**ITSi:** The cataloging client.

**LED:** Library Exception Dates are the days that the library is closed.

**Library Services:** This section of CARL•Connect Staff Circulation is for transactional functions such as checking out, checking in, and pulling holds (fill lists).

**Loader:** a program that adds or changes bibliographic records in the CARL•X database by processing MARC records. See also “Batch Load.” It can process any MARC record, including pre-processed item records. It’s not scary at all—you’ll do fine.

**Local Vendor Number:** A locally assigned vendor number, up to 10 digits, by which your library identifies the vendor.

**Location:** Where the item is in the library at a given time. Most often shelf location.

**Log (in receipt printing):** Print everything.

**LS2:** An old name for the Discovery Layer. Some discovery administration functions still references this name.

**Manual Hard Block:** Hard block placed by staff that restricts patrons from library services. This cannot be overridden by staff. Can only be removed by authorized staff.

**Matcher File:** Searches number data in bibliographic records, typically control numbers used for matching records upon uploading bib records through the loaders.

**Media Type:** Describes the format of an item. This will often correspond with the former “item type” in Sierra’s item record. This is not the same as the material type in Sierra.

**Negotiate:** Pay a fine.

**On Shelf status:** Available to patrons and should be located on the shelf for checkout.

**Patron Status:** Like in Sierra, this determines the access a patron has available to them. Statuses include:

- **Good:** There are no blocks on the patron account and they are in ‘Good’ standing.
- **Hard Blocked:** Placed on an account that has reached a system blocking threshold. These can only be cleared once the delinquency has been resolved to beneath the blocking threshold. This restricts patrons from all library services. Can be overridden by authorized staff.
- **Overridden:** Accounts that are hard blocked and staff accessed the account to override the block previously.
- **Soft Blocked:** Informational block used to bring concerns to the attention of staff. This can be cleared once staff remove the block. Can be overridden by authorized staff.

**Pay Later:** When marking an item “Lost”, staff have the option to take payment at that moment or selecting “Pay Later” in which this will write the fine to the patron’s outstanding fines and they can pay their fines at a later date.

**PC Only:** Patrons are allowed to use the public computers but not other library resources. This would be the same as our current Internet Only patrons.

**Preferred Branch:** home agency, can be set by staff in patron record, or by patron in their account.

**Predefined Note:** Notes most widely used throughout the system and can be chosen from a drop-down list of options. These notes CAN be searched by.

**Production Database:** OWLSnet will have 2 databases: a production database is the database we will use to conduct everyday business. The testing database is used for training purposes or testing new features or changes we want to implement. At this point we are in the testing database.

**Replace and Activate Next Hold:** If a hold expires, this option will place the current patron with the hold at the end of the hold queue and fulfill the hold for the next patron.

**Report Archive:** Allows staff to access report data files that have been archived to their workstation for future review and reference. This is set in the Admin Client's Workstation Settings > DSS Defaults tab.

**Router:** The process run overnight to page items from libraries to fill holds at other locations.

**Router List:** A "paging list" of items for libraries to pull holds in CARL•X. CARL has three different types of router lists:

- **Title Router:** This is a bib-paging list.
- **Issue Router:** See above for Issue Holds definition. This will be a paging list of those items.
- **Item Router:** This is an item-paging list.

**Routing List:** If a serial is distributed to library staff, the system will allow for a list of those who should see it and print that list to route with the issue.

**Searching (in InfoSoup):** A filter that allows searching for owned items in a library's collection.

**Select Back:** Open or edit a record in CARL•X.

**Self-service activity:** Patron activity initiated outside the ILS, such as database use.

**Smart Pages:** Staff view of patron's loans, holds, fines in CARL•Connect Staff. You get here by clicking "MyAccount."

**Sponsor:** A caretaker for a patron—someone who will be responsible if the patron is ineligible. An example of when this can be used is with a parent for a juvenile.

**Syndetics:** A third-party vendor that supplies the online catalog with book jacket images, summaries, reviews, awards, and table of contents.

**SQL:** Structural Query Language is a computer programming language specifically designed to for retrieving data from relational databases. You will often hear it called S-Q-L or “sequel.” Pronunciation is a hotly debated topic in certain circles.

**Temp Record:** A temporary bibliographic record that can be created in the CARL•X Staff client. Often used when a library is placing an order, but a bib record is not yet in the system.

**Testing Database:** OWLSnet has two databases: the testing database is used for training purposes and for testing new features or changes we’d like to implement before we roll it out into the production database. Changes done in the testing database will not impact the production database, which we will use for day-to-day business.

**Tracer:** A Tracer can be placed on an item when the item is in an “On-Shelf” status, and the item cannot be located on the shelf. The item becomes unavailable for patron requests and appears on reports for shelf checks.

**Trusted Record:** A record created to represent titles with the same intellectual content in the FRBR view on InfoSoup. This impacts, among other things, the image displayed. It’s a dynamic record, so this can change when new bib records are added.

**Who Notes:** Circulation transactional data that shows staff who has an item, the last 3 patrons who had the item, who owes fines or fee against the item, and who has the items on hold. Can be accessed in CARL•Connect Staff by clicking on a link in an item record.

**Wishlist (in patron record):** This functionality is used in Outreach to keep track of patron wish lists and materials they’ve already checked out. We will discuss enabling this functionality at a later AAC. This is different from the patron’s wish lists/reading history in InfoSoup, which patrons control and staff cannot see.

**User ID:** Barcode number

**UDF:** This is short for “User Defined Field” which is located in the Patron Record. These fields help us run statistics on information not accessible in other fields. So far, the user defined fields are:

- **Home Agency:** same use as in Sierra.
- **Municipality:** Same use as in Sierra—this is **very** important for annual reports, so make sure this is updated or verified every time there is a change of address.
- **School:** This is a new field to keep track of local initiatives with schools. This field is not mandatory and can be used at the library’s discretion. It is a dropdown list with a few schools added already. If you would like a school included in this list, please email OWLSnet Help.
- **County:** This is a new field intended to help us with annual reports and cross-county funding statistics.

- **Replaced Card:** A User Defined Field where libraries can indicate how many replace cards a patron has received. This is a free-text field, but limited to 100 characters. If a library needs to keep old barcodes we recommend moving them to a Note field and using the Replaced Card field to record the last barcode (if necessary), the date of last replaced card, and/or how many replaced cards a patron has had.
- **Campaign:** A User Defined Field located in the patron's record that libraries can use for internal initiatives they want to track, outreach events or forgiveness programs. We recommend a library comes up with standard language so they can run reports on this field. This field is free-text but limited to 100 characters.

**User Services:** This section of CARL•Connect Staff Circulation is for finding, editing, and creating patron records.

**Utility:** The Utilities contain reports and parameter sets that allow for updating data as opposed to simply viewing data.