CARL Conversations: July 14, 2021

Topic: Adding Items in Connect

Question and Answer Session

1. If you don't want item information to display, how would you do that?

   Within the item record, there is a Suppression Manual box, check this if you DON'T want the item to display in InfoSoup.

2. Can you print a label from CARL Connect?

   No, you cannot print a spine label from Connect. You need to print labels in CARL-X. Some libraries using Connect for adding items may use multiple windows where they have CARL-X open for printing labels and Connect open for creating the item.

3. Should staff be using CARL Connect for the functions available and only using CARL-X for functions not in CARL Connect?

   This depends on your preference and comfort level. There are still some functionality gaps between the two platforms, but OWLS recommends Connect for Outreach and registering new patrons, but CARL-X for checking materials in and out. Each platform has their features that enhance use, like CARL-X having the Clone button -- if you have a whole family getting cards. TLC is working on these gaps and will be included in future releases.

4. Staff have noticed a few times that there are some libraries circulating new items before the sell date. With lots of new staff, maybe not everyone is aware of this/or where to find this info. Can that be explained somehow to everyone again?

   This comes up every so often. There is an example of an invoice that Amanda will send out to the Tech Services list as a reminder to everyone. Invoices and packing slips are not always correct, so it's helpful to check some resources like Amazon. Amanda will reference Baker & Taylor and Ingram as well in her email.

5. Are they working on the lag that occurs every time we click on the "charge" button?

   OWLS knows that TLC is working on lags in general but was unaware of this specific lag. OWLS was aware of lags between functions but again was unaware of any patterns. OWLS will open a ticket for this. The issues staff have with moving from function to function can be alleviated by using the Window option from the menu. When staff are in one function, say checking out to a patron and then that patron asks to place a hold, staff can go to the Holds function, place the hold and then go up "Window" along the top menu bar and select the Charge function to pull that back up. There is an option to Cascade the windows as well, that will shrink all windows down, so all can be seen.

6. When is the next update for CARL? And what's included?

The next update is scheduled to be released later this month (July 2021). OWLS will need to schedule it to go into the test environment and do as much testing before updating it in the production database. We will do a CARL Conversation to show you all the changes after testing. OWLS isn't sure of the new features but can look them up and send out to the libraries. Nothing official has been released by TLC yet, on the new update, but we know they are working on narrowing the functionality gap between CARL-X and Connect.

7. Has TLC ever told us why accessing patron information takes so long?

No, but they are investigating the issue they know about, which is going from function to function. Before today, OWLS was unaware about a pattern with patron information. OWLS will open a ticket to let TLC know of this.

8. When pulling an item for holds, our staff selected an item with a different barcode than what was listed on the Pick List. Is this normal for it to act this way?

Yes. If you use Connect to pull your list, then there's always that option to "fill with" that gives other items that could fill the current hold. If you scan another item with a different barcode listed on your pick list, it should still fill the hold. If you use CARL-X for your pick list, then this won't be the case. It will only show you one barcode, but it should still fill the hold.

9. Do you ever need to edit other libs records now that we have a damaged items workflow?

Yes, libraries need to be able to change the statuses of short loan materials and remove notes for that workflow.

10. What is still causing day to day frustrations with workflow?

Moving from function to function. This can be alleviated by using the Window option from the menu and selecting the window/function you'd like to be in.

Being able to do more within a single screen in Connect rather than having to go back and forth between Library Services and User Services. Possibly different color schemes between the patron facing catalog and the staff side.

Having the Patron Information disappear after the receipt has printed would be helpful. Staff forget to click on Next patron to clear the screen.

11. What topics would you like to see talked about in a CARL Conversation?

Once BiblioCommons is up and running, OWLS will have some sort of training/informational meeting to go over the features there. Next week OWLS will be going over loan rules, and then inventory. Pivot tables is a topic that libraries would like to see. Molly will let everyone know when that is coming. Also, more information on reports.

12. Are weekly CARL Conversations still desirable? Or are monthly or biweekly okay?

From feedback, OWLS can go to less frequent schedule. Next week will be on loan rules and then there will be one on inventory. Probably within the next month or so, OWLS can push the conversations out farther. If there are any requests for topics, please send them to us.