

CARL FAQs for Libraries

This document is intended to answer some general questions about the CARL migration. I will add to it every day as I get questions. If you have something to add, please email me, Amanda, at alee@owlsweb.org.

What's the difference between all the CARLs?

CARL is the broad product name.

CARL•X is the desktop client. Not everyone will need a desktop client installed on their computer.

CARL Connect covers the web-based platforms CARL Connect Staff and CARL Connect Discovery.

CARL Connect Staff is the web-based platform for library staff to use. Functions include circulation and item maintenance. Future developments are going to this platform, so we are strongly recommending libraries use CARL Connect Staff much as possible. This will not live on a desktop but be accessed through the Internet. This can be used on a mobile device or laptop without the limitations of Sierra in the Wild.

CARL Connect Discovery is the web-based patron-facing online catalog. We'll still call this InfoSoup, but training will call it CARL Connect Discovery.

How will I know if I need the CARL•X client on my computer?

Each library has a designated trainer who will make those decisions. Many staff will not need the client, but we do expect it will be installed on at least one computer at each location. The library trainers are currently testing and learning about the new software and will make those decisions based on the needs of each library.

TLC is working to move additional functionality to CARL•Connect Staff, but some tasks can still only be done in the CARL•X client. The functions not currently available in CARL•Connect Staff include:

- Claims Returned
- Claims Never Had
- Reports
- Cataloging
- Acquisitions
- Serials Maintenance
- Hold Maintenance
- Offline Circ

CARL•Connect Staff allows for merging patrons while CARL•X does not.

Do I need to use CARL•Connect Staff? Can my library only use the CARL•X Client?

You are not required to use CARL•Connect Staff, but we highly encourage it since future development is going toward this product and development they did for us, such as spine labels and automatically creating the Hold Alias on Hold Shelf Slips is also reflected here. However, we will not deny any library access to the client if that what their trainer decides is most appropriate. A combination of these two platforms may be necessary to get full functionality your library requires.

We expect the client to be installed on at least one computer at each library.

Is CARL•Connect Staff secure? I'm not so sure about accessing the ILS from the Internet!

CARL•Connect Staff is accessed through the Internet, so staff will go to a web address and access our database with a username and password. The connection will be encrypted using https technology. Https technology is secure, but there is a risk of usernames and passwords being compromised or computers/devices left unattended while logged in. To mitigate this risk we are limiting the web connection to our network, so you will only be able to access the CARL•Connect Staff when on a library computer or connecting to our network with a VPN (like Sierra in the Wild).

Why aren't we using Alt IDs anymore?

Alt IDs in Sierra are meant to prevent duplicate cards. This was an imperfect system, particularly for common names or twins, triplets, etc. CARL's duplicate checker is more accurate and doesn't require a code to be created and searched. We can add this back if libraries think they will continue creating and/or searching by them.

Why don't I see the Hold Pickup Alias?

This is automatically created in CARL•Connect when printing a Hold Shelf Receipt. They did development to keep this the same for us (First 2 letters First Name, First 2 Letters Last Name, Last 4 Library Card Number).

How do I get these exercises everyone is talking about?

Your trainer will share exercises when they feel comfortable with the workflows and are ready to implement their local training plan.

Where can I see the training videos?

Training videos will be posted [here](#). Please work with your local trainer to determine which session will be relevant to your library's workflows.

Can I use these trainings to fulfill Continuing Education Requirements?

Yes. TLC is sharing participation lists with me and has created a survey as required by DPI to assess whether learning objectives were met.

Can I see the documentation or other resources put out by TLC?

The CARL Community is available to all our library staff. The CARL Community includes documentation, webinars, training videos, company roadmaps and more. Please work with your local trainer to determine who should have access to this resource.