

## CARL Conversations: March 4<sup>th</sup>, 2021

### Topic: Checking in and checking out with CARLX

#### Question and Answer Session

1. How do you change the due date if you forgot to prior to checking out?

Staff have a few options: They can check the item back in and then make sure to check Override Due Date box BEFORE checking it back out. This option will count as an additional circ and will also trap the next hold if there is one.

Staff can also use the Quick Return button from the Charge screen. This will count as an additional circ.

Staff can perform a charge-on-charge. Check the item out to the patron again, without returning it, and make sure to change the due date before doing so. Also, performing a charge-on-charge will bypass the need to fill next holds. When the big, red box appears that says "Item is Already Charged by this Borrower," click "Renew Item."

2. Will Charge-on-Charge work for items checked out through WISCAT?

Yes. This shouldn't cause any issues. If the item is checked out on the patron card, you should be able to perform a charge-on-charge like any other items.

3. Why is OWLS recommending using CARLX oppose to CARL Connect for checking out?

OWLS made this recommendation based on library feedback of the limitations staff have with CARL Connect. This mainly pertains to checkout functions, and lack of information/pop-ups as to why patrons can't check out. Holds are also allowed to be checked out to the wrong patrons in CARL Connect. With the amount of functionality gaps, OWLS thought it best to use CARLX until these gaps can be filled by TLC. OWLS isn't requiring staff to use CARLX over CARL Connect, but until these gaps can be filled, it can be the easier option.

4. Why does CARLX always seem to beep even when it's scanning incorrectly? Can't there be different sounds or no sounds at all?

TLC is currently working on sounds in CARL Connect, not CARLX. Amanda will give TLC some feedback on the CARLX sounds as well, including having the option to turn them off.

For the time being, staff can turn their speaker sounds off or to mute so that they don't need to hear any of the sounds if they don't find them pertinent in their daily circulation tasks.

5. How do we know if we set up our print receipts correctly? Ours still seem to be printing oddly.

There are multiple templates in the Workstation Settings > Receipt Printing. These need to be set correctly in order for your receipts to print as you expect. OWLS can check this for you if you send OWLSnetHelp what they are currently set to and how you expect them to look. OWLS will

also send out PDF's of what all the print templates look like. If the templates don't meet your library needs, these can be adjusted to create a custom template for your library.

6. Do the print receipt settings need to be changed on each workstation?

Yes. If you select one print receipt on one computer, you will need to select this same one on your other circulation computers using CARLX in order for them to look the same.

7. Every time I try to change my print receipt in the settings, it seems to revert back to the initial template. How do we know if we've selected the right one moving forward?

When you select the receipt type you want from the drop-down menu of what you want to change, the one you previously chose will be the one you see in the Template drop-down. Select the one you want and click OK. You will need to close out of CARLX and restart it.

8. Why do my settings keep telling me I need to choose a printer when I try to change my receipt templates?

When in your Workstation Settings, you need to make sure you are selecting a printer from the Printer drop-down menu. Until you do, you will keep getting this error. You most likely want to select your zebra receipt printer.

9. How do we print off receipts for patrons after they already paid using CARLX?

To print a receipt at the time of payment, make sure your workstation settings are set to print Negotiation Receipts. Go to Tools > Set Workstation Settings > Receipt Printing, then select the number of receipts to print at the time. Some libraries select 2 receipts to print so they can keep a copy of the receipt or send it on to another library with payment. That number of receipts will automatically print after a financial transaction.

Workstation Settings

Spine Label	Fines	Defaults
System Configuration	Searching	Receipt Printing

Receipt Printer Attached to PC  
 One Receipt Per Item in Charge and Renew  
 Use Custom Receipts

Printer: Microsoft Print to PDF

When to Print:  
 Print as you go  
 Print at the end

Format:  
Characters per Line: 40

Automatically Generate:  
 Charge Receipts  
 Renewal Receipts  
 Hold/In Transit Receipts  
 Refund Receipts  
 In Transit Receipts  
 Hold Slips  
 Negotiation Receipts 1

Custom Receipts:  
Type: Patron Receipt  
Template: Sample Patron

Printer Feed Options:  
 Automatically Cut  
 Form Feed

Custom Message:

OK Cancel

10. If the email receipt box at checkout is checked, will patrons automatically get emailed receipts? Can we just uncheck this if they want a printed copy?

Yes. If you have a patron who wants emailed receipts, you can check this box. If they decide they don't, you can uncheck the box and it will save the settings. While this box is checked, CARL will

attempt to email receipts to patrons with a valid email address. CARLX does not prompt at each transaction if the patron wants a printed or emailed receipt.

This setting is only for receipts, not for notices (courtesy, hold pickup, hold cancellation, and overdue).

11. For spine labels, do the call numbers wrap when printing? If not, is there a template to make the font smaller so it can all print on one line?

OWLS is not certain if the call numbers can wrap but the font is hard coded and can't be changed.

12. Prefixes are printing to the next line when there is plenty of room for them to print on the same line. Why is that? Items are getting mis shelved because of this.

Line breaks for spine labels are hard coded in. When the migration started, Liz had gone through each library's location codes, what they were using, if any needed a suffix or prefix with the call number, and how many lines it should be on. This was a huge undertaking and project that required a lot of time on both Liz and TLC to implement. When any changes need to be made to these, Liz needs to be contacted so that she can contact TLC of these changes. Then TLC can make those changes for the next update. It's not something that can be changed overnight.

13. Is it possible to get the enumeration to automatically print on the second line like it did in Sierra?

Amanda will ask TLC about this.

14. If a patron decides they no longer want a hold, can staff remove the hold without going into the patron's record?

Staff can cancel holds from the item/BID record if needed. It will prompt for a hold cancellation reason, which isn't required but is helpful. If a cancellation reason is selected and the box for notifying the patron is checked, then the patron will get an email indicating the hold was cancelled and why. Most likely they will NOT receive a print notification, but Amanda will check on this to be certain.

15. In CARLX, in the patron's Notice History shows that emails and text messages have been "Sent/Extracted." Does this mean that the email was opened?

Extracted means the notices were processed and the email was sent to the patron. OWLS cannot see if a patron opens the emails sent. And the text messages go nowhere. This Notice History is only for print/email notices.

16. For Short Loan stickers, should only the owning library be removing these?

Removing Short Loan stickers should only be done by the owning library. Putting them on can be done by anyone per the procedure. Please verify within the item record for the media code and/or holds and replace the sticker that has fallen off. Also, please remove the messages for short loan as needed.

17. How do you renew an item that isn't in front of you and the patron has several items checked out?

When in the patron Summary, click on the Charges radio button to see current charges. You should be able to click/highlight the item to be renewed and you can click on the Renew button. There is a Renew All button as well, but for single items, just click on Renew.

18. When looking at a patron's record, is it only when you go to PAY that you see the total? Or can this be seen somewhere else?

You need to click on Pay in order to see the total. OWLS will check with TLC to see if this could be a development request.