

## **Upgrade Notes on CARL.X 9.6, 9.6.3.5, 9.6.4 and CARL.Connect 1.5, 1.5.2, 1.5.3.2, 1.6**

### **CARL.X**

1. Patron Searching
  - a. A date of birth column has been added in the Patron Search results
2. Renewals
  - a. A BRB for a denied renewal will no longer stop the renewal process for all items selected
3. Hold Cancellation
  - a. Additional customized hold cancellation reasons will be added to CARL.X: Damaged item; another copy requested, Unable to purchase material requested, In-library use only, Public services internal use
  - b. All hold cancellation reasons will be in alphabetical order
  - c. The default selection for notifying customers when holds are cancelled will be turned OFF
4. Item Maintenance
  - a. The BID information area has been reorganized; the Branch and Location fields have been removed
  - b. Quick Maintenance now shows the owning branch when items are added
5. Patron Information
  - a. An "Email2" line has been added. This line is not something MLS will use as it will not send customers emails if there is a second email listed.

### **CARL.Connect**

6. Login workflow is different
  - a. If default branch is set in User Settings, user does not need to select which branch to log into
  - b. If branch is not set, user will select the branch each time on logging in
  - c. If you need to change which branch currently logged in as you will need to log out and log back in
7. Several user interfaces throughout CARL.Connect have been updated to help with accessibility and function
8. Check in
  - a. A new condensed view option displays to the right of the counters, allowing staff to quickly toggle between the default view and a condensed view of the list, which would allow more entries from the list to display, with less padding in each row
  - b. Check In details for items that have been checked in has moved to the top of the page, with a new design
  - c. The Clear List and Receipt buttons have also moved to the top of the page

- d. The Item ID (barcode) is now a link and clicking on it will bring up the Item Detail lightbox

## 9. Checkout

- a. The Account Summary display has been replaced and updated with a new design and access to more information
- b. Check Out will now display Your Branch Summary and System Account Summary
  - i. The Your Branch Summary will be open by default upon entry into Check Out and will display a summary based on the Branch that staff is logged into
  - ii. The System Account Summary will be closed by default upon entry into Check Out but can be opened simply by clicking on the arrow
- c. The patron quick view option has moved from the bottom of the page, to the top, near the summary views, along with the Finish/Receipt button and the counters
- d. Within the Check Out grid itself, the following columns were added: Branch, Location, Media, and Information

## 10. New User Registration

- a. Full Registration and PC Only Registration are no longer options for registering new users
- b. All CX default patron registration defaults will be applied in CC

## 11. Fill List / Holds

- a. If an item is marked Hold Pending, other items can fill the outstanding hold
- b. Now have dynamic holds! Currently, we have dynamic holds for item level holds. Moving forward, title and issue holds will automatically be added to the hold list once the hold is placed.
- c. The filled and not found counters have been moved to the top of the page, along with the number of requests
- d. A new condensed view option displays to the right of the counters, allowing staff to quickly toggle between the default view and a condensed view of the list, which would allow more entries from the list to display, with less padding in each row
- e. A Refresh button has been added to the interface to ensure any new holds are added to their Fill List
- f. New columns have been added to Fill List
  - i. Status Date – Displays the status date of the item
  - ii. Pickup Branch – Displays the pickup branch for the hold
  - iii. Hold Type – Displays the hold type (issue, item, title)
  - iv. Columns within the grid can be resized
- g. A new *Fill With* option has been added
  - i. The Fill With option allows staff to fill the listed hold with a different holdable copy/Item ID that is "On Shelf" at their branch, without the need to scan or manually enter a new item number

- ii. Upon clicking/tapping the Fill With option, a new Fill With page opens, displaying item(s) that could also fill the same hold. Staff simply select the entry in the grid and then click found or check in to fill the hold
  - iii. If there are no other items that can fill the hold then staff will get a message alerting them of this when Fill With is selected
- h. If an item in Fill List is no longer in an "On Shelf" status when staff attempt to select found or not found, they will be presented with a message alerting them to this fact and the entry will be removed from Fill List
- i. Finally, the following issues were resolved:
  - i. Within Fill List, when staff mark an item as Not Found, the item status will update, and the status date will also update appropriately
  - ii. Sorting by any column header, and then interaction with the Fill List options (Check In, Found, Not Found) will no longer cause the Fill List entries to duplicate
  - iii. In Fill List, selecting an entry and then clicking an option will no longer cause the page to refresh and take the user back to the top of the page

## **Catalog**

12. Customers will be able to change their hold pickup location in the catalog as long as the hold is not *in transit hold* or *hold shelf*
13. Facets for Playaways will be available
14. Place in holds queue will display once we request it to be turned on
15. Renewals in the mobile catalog will be fixed