Master CARL Course Listings in MetroU

Initiatives

Prerequisites

- All CARL accounts prerequisite: CARL Basics
- Creating Accounts and CARL.Connect Create New User prerequisite: Establish Eligibility
- Troubleshooting Accounts prerequisite: Circulation

Workroom (2)

This initiative is required for Library Aides to complete by the end of their third month of hire. Courses will provide training on the Item Maintenance and Circulation module.

- **Staff**: Library Aides
- **CARL Courses**: Item Maintenance, Circulation

Circulation Desk (6)

This initiative is required for Access Specialists to complete by the end of their third month of hire. Courses will provide training on the Circulation and Item Maintenance module. Additionally, there will be training on establishing, creating, and troubleshooting library accounts. Training on Point of Sale will also be covered.

- **Staff**: Access Specialists
- **CARL Courses**: Establish Eligibility, Creating Accounts, Circulation, Troubleshooting Accounts, Point of Sale, Item Maintenance

Reference Desk (5)

This initiative is required for Engagement Staff to complete by the end of their third month of hire. Courses will provide training on the Circulation and Holds module. Additionally, there will be training on establishing, creating, and troubleshooting library accounts.

- **Staff**: Librarians, Engagement Specialists
- **CARL Courses**: Circulation, Holds, Establish Eligibility, Creating Accounts, Troubleshooting Accounts

Manager (7)

This initiative is required for in-house managers to complete by the end of their third month of hire. Courses will provide training on the Circulation, Hold, and Item Maintenance module. Additionally, there will be training on establishing, creating, and troubleshooting library accounts. Training on Point of Sale will also be covered.

- **Staff**: Access Managers, Engagement Manager, Assistant Library Managers, Library Managers

- **CARL Courses**: Establish Eligibility, Creating Accounts, Circulation, Troubleshooting Accounts, Holds, Point of Sale, Item Maintenance

Courses Not Attached to an Initiative or "One Offs"

- Fill / Wander List
- Patron Searching
- Reports
- Item Searching
- Serials
- CARL.Connect User Searching
- CARL.Connect Create New User

Courses

CARL Basics

Description

This course will provide foundational knowledge for CARL.X. Attendees will learn tips navigating and the basics of error messages. Attendees will also learn about library accounts, checking material out, returning material, and item maintenance. As this is a basics course, information learned will provide foundational knowledge for CARL.X will be a prerequisite for any CARL training.

Objectives

- Log into CARL.X and update password
- Locate different menus and menu items within the application
- Navigate various aspects of accounts
- Find the Borrowing Policy and Procedure on the Intranet
- Check material out using CARL.X Charge
- Check material in using CARL.X Return
- Interpret title and item information under Item Maintenance

Estimated time to complete

25 minutes

Establishing Eligibility

Description

This training will introduce you to our account types, service area, and establishing eligibility.

Objectives

- Find the library accounts policy and procedure on the Intranet.
- Determine eligibility requirements for guests.
- Identify and explain the different account types.
- Evaluate the correct account type when creating accounts.

Estimated time to complete

25 minutes

Creating Accounts

Description

This training will teach you how to create a new account using account formatting best practices.

Objectives

- Create new accounts.
- Apply account formatting best practices when creating accounts.
- Determine appropriate notifications based on account needs.

Estimated time to complete

25 minutes

Circulation

Description

This training will teach you about the borrowing policy and procedures. You'll learn about Big Red Boxes (BRBs) in Charge and Return as well as the functionality of these windows.

Objectives

- Find the borrowing policy and procedures on the Intranet.
- Review why a specific big red box was displayed.
- Explain the Damaged Items functionality.
- Demonstrate how to check an item in as Damaged.

Estimated time to Complete

40 minutes

Troubleshooting Accounts

Description

This training will teach you about blocked accounts, statuses, notes, and merging accounts.

Objectives

- Identify the three ways an account becomes over threshold.
- Access when and how to use Claims Never Had.
- Analyze notes on the account for relevancy.
- Merge accounts.
- Determine why fines / fees are on the account.
- Handle routine circulation problems.

Estimated time to complete

35 minutes

Point of Sale

Description

This training will teach you how to navigate and process payments in Point of Sale.

Objectives

- Understand how data from CARL is transferred in Point of Sale.
- Navigate and use Point of Sale.
- Explain how to process payments in Point of Sale.

Estimated time to complete

25 minutes

Item Maintenance

Description

This course will provide you with an overview of Item Maintenance.

Objectives

- Distinguish the difference between BID information vs Item information.
- Interpret information about each item and title.
- Demonstrate understanding using quick maintenance.

Estimated time to complete

25 minutes

Holds

Description

This training will teach you about placing, managing, and troubleshooting holds in CARL.X.

Objectives:

- Explain the differences in hold types.
- Analyze holds in Patron information to troubleshoot requests.
- Recall best practices regarding holds and internal customer service.
- Troubleshoot situations.
- Analyze why items do not allow you to place or fill a hold.

Estimated time to complete

20 minutes

Fill / Wander List

Description

This training will teach you about holds in CARL.Connect.

Objectives

- Locate and complete the fill list in CARL.Connect.
- Locate and complete the wander list in CARL.Connect.

Estimated time to complete

20 minutes

Patron Searching

Description

This training will teach you advanced searching techniques to search for patron accounts in CARL.

Objectives

- Determine which search to perform based on the information given.
- Recognize when to use a wildcard search.

Estimated time to complete

27 minutes

Reports

Description

This training will provide an overview of the four main Circulation reports we run.

Objectives

- Run and complete the tracer list.
- Run and complete holds expired list.
- Run and complete in transit list.
- Run and complete claims never had list.

Estimated time to complete

20 minutes

Item Searching

Description

This course will teach you advanced searching techniques in Item Maintenance as well as how to use Companion Searcher.

Objectives

- Locate an item by title or item number.
- Identify basic searches in CARL using shortcuts.
- Construct a search using limiters to filter results in CARL.

Estimated time to complete

27 minutes

Serials

Description

This training will provide an overview on terminology, withdrawing serials, how to handle renewal notices, troubleshooting serials, and CARL.X Serials. All in library staff have access to Serials in CARL.X to check in issues, create items, and set item creation defaults.

Objectives

- Locate enumeration and chronology in a newspaper and magazine.
- Withdraw a magazine.
- Withdraw a newspaper.
- Check in a magazine.
- Check in a newspaper.
- Write a RFID tag to a magazine.

Estimated time to complete

25 minutes

CARL.Connect User Searching

Description

This training will teach you how to search for users in CARL.Connect.

Objectives

- Determine what type of search to perform based on the information given.
- Recognize when to do a wildcard search.

Estimated time to complete

25 minutes

CARL.Connect Create New User

Description

This training will teach you the basics of creating a new user account in CARL.Connect.

Objectives

- Apply account formatting best practices when creating accounts.
- Create a new user account in CARL.Connect

Estimated time to complete

25 minutes