

## A NOTE ON ACCESS BASICS

Will be renamed to CARL Basics. Changes will be made with February 2023 launch.

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### COURSE DESCRIPTION

Access Basics will provide foundational knowledge for CARL.X. and CARL.Connect. Attendees will learn tips navigating and 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 and CARL.Connect. It will be a prerequisite for all CARL Workshops. Required for Access Specialists and Access Managers to be completed by week two of hire and all other Public Services Staff to be completed by week four of hire.

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### OBJECTIVES

By the end of this training, learners will be able to demonstrate the following in CARL.X and CARL.Connect:

- ~~• find the Library Accounts Policy and Procedure on the Intranet~~
- ~~• identify and explain all the different types of library accounts and eligibility~~
- log into CARL.X and update password
- log into CARL.Connect
- locate different menus and menu items within the applications
- navigate various aspects of accounts
- find the Borrowing Policy and Procedure on the Intranet
- check material out using CARL.X Charge
- check material out using CARL.X Return
- interpret title and item information under Item Maintenance
- ~~• locate and complete morning holds in CARL.Connect~~
- ~~• take a "second look" for holds in CARL.Connect~~

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### OUTLINE

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|--|-------------------------------------|
| i. <del>Library Accounts</del>         | iii. Borrowing                      |
| <del>a. Service Area</del>             | a. Borrowing                        |
| <del>b. Library Account Types</del>    | b. Checking out                     |
| <del>c. Establishing Eligibility</del> | c. Returning Material               |
| <del>d. What are the Risks?</del>      |                                     |
| ii. CARL.X Basics                      | iv. CARL.X Item Maintenance         |
| a. Logging In and Out                  | a. Basics                           |
| b. Navigation                          | b. Terminology                      |
| c. Patron Searching                    | c. Searching for Material           |
| d. Patron information tabs             | <del>v. CARL.Connect Basics</del>   |
| e. Notes Overview                      | <del>a. Logging in and out</del>    |
| f. History                             | <del>b. Navigation</del>            |
|  | <del>c. Morning Holds</del>         |
|  | <del>d. Second Look for Holds</del> |

## NEW CARL TRAININGS

### Highlights:

- Launch February 2023
- 12 Micro-Courses (20-30 minutes); 3 having instructor led training
- Checklists and scenarios are our focus.
- All content in this document is in draft mode and may change.

### Learning Paths:

- **Workroom:** Item Maintenance, Circulation
- **Circulation Desk:** Establish Eligibility, Create New Accounts, Circulation, Troubleshooting Accounts, POS, Item Maintenance
- **Reference Desk:** Item Searching, Circulation, Holds, Establish Eligibility, Create New Accounts, Troubleshooting Accounts

## ESTABLISHING ELIGIBILITY

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### COURSE DESCRIPTION

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

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### OBJECTIVES

By the end of this training, learners will be able to:

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

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### OUTLINE

- b. Library Accounts
- c. Account Eligibility
  - i. Library Account Types
  - ii. Requirements for Minors
  - iii. Library Account Holder Responsibility
- d. Establish Eligibility – Ways to Say Yes
- e. Risks of Saying Yes
- f. ECARD
- g. How do we establish Eligibility
- h. Tips

## CREATING ACCOUNTS

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### COURSE DESCRIPTION

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

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### OBJECTIVES

At the end of this training, learners will be able to

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

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### OUTLINE

- a. Creating a New Account
- b. Notifications
- c. Account Formatting Best Practices
- d. Address Updates

## PATRON SEARCHING

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### COURSE DESCRIPTION

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

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### OBJECTIVES

By the end of this training, learners will be able to:

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

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### OUTLINE

- a. Search Types
  - i. Keyword
  - ii. Birthday
  - iii. Phrase
  - iv. Browse
  - v. Begins With
- b. Wild Card
- c. Search Tips
- d. Practice

## TROUBLESHOOTING ACCOUNTS

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### COURSE DESCRIPTION

This training will teach you about blocked accounts, statuses, notes, and merging accounts. There is an instructor led portion for this training.

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### OBJECTIVES

By the end of this training, learners will be able to:

- 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
- Execute merging accounts
- Determine why fines / fees are on the account
- Handle routine circulation problems

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### OUTLINE

- a. Background (key info to know to talk about troubleshooting accounts)
  - a. Notes
  - b. Fines (waive/cancel)
- b. Statuses
  - a. List the five statuses, overview
- c. Blocked
  - a. Returned Mail
  - b. Special Stop
  - c. Over threshold
    - a. 50+ in fines
    - b. Lost Items
    - c. Claims Limit
- d. Common Situations
  - a. Lost Cards
  - b. Merging Accounts

## CIRCULATION

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### COURSE DESCRIPTION

This training will teach you about the borrowing policy and procedures. You'll learn about big red boxes (BRB) in Charge and Return as well as functionality of these windows.

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### OBJECTIVES

By the end of the training, learners will be able to:

- Find the borrowing policy and procedure on the intranet
- Review why a specific big red box was displayed

- Assess condition of material upon return
- Explain the Damaged Items functionality
- Demonstrate how to use Damaged Items

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## OUTLINE

- a. Borrowing Policy
- b. Charge
  - ii. BRB
- c. Blocks at Self Check
- d. Scenario
- e. Returning
  - iii. Backdating
  - iv. BRB
  - v. Damaged Items Button
  - vi. Damaged Procedures
  - vii. Note on aged/worn
  - viii. Missing Pieces
- f. A Note on Auto Renewal

## HOLDS

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## COURSE DESCRIPTION

This training will teach you about holds in CARL.X in relation to the CARL.X hold window, placing holds, and troubleshooting situations.

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## OBJECTIVES

By the end of this training, learners will be able to:

- Explain the differences in hold types
- Explain options in CARL.X Holds Window
- 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

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## OUTLINE

- a. Holds in CX
  - i. Hold Screen
  - ii. Hold FAQ
  - iii. Delete Holds
  - iv. Reorder Hold Queue
- b. Hold BRB
- c. Note on Holds

## ITEM SEARCHING

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### COURSE DESCRIPTION

This course will teach you advanced searching techniques in item maintenance as well as using companion searcher.

### OBJECTIVES

By the end of this training, learners will be able to:

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

### OUTLINE

- a. Item Searching
  - i. Why
- b. Basic Searching
  - ii. Shortcuts
  - iii. Wild card
  - iv. Combined author and word
  - v. Expand / narrow
  - vi. Date limiting
- c. Companion Searcher
  - vii. What
  - viii. Search Types
  - ix. Performing a Search
  - x. Window navigation

## ITEM MAINTENANCE

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### COURSE DESCRIPTION

This course will provide you detail of Item Maintenance including item detail, who notes, and quick maintenance.

### OBJECTIVES

By the end of this training, learners will be able to:

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

### OUTLINE

- a. Overview
- b. Read an Item Record
- c. Item Detail
- d. Who
- e. Edit
- f. Item Statuses and Location Codes
- g. Withdraw Material
- h. Quick Maintenance

## POINT OF SALE

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### COURSE DESCRIPTION

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

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### OBJECTIVES

By the end of this training, learners will be able to:

- Interpret data from CARL in Point of Sale
- Navigate and use Point of Sale
- Explain how to process payments in Point of Sale

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### OUTLINE

- a. Fines and Fees in CARL Overview
- b. Money
- c. Reprint a receipt
- d. A note on refunds when/why/why not
- e. How to print deposit
  - i. A note on deposit
- f. Scenarios
- g. POS Practice

## REPORTS

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### COURSE DESCRIPTION

This training will provide an overview of the four main Circulation reports we run as well as provide a broad understanding of how various statuses affect reports.

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### OBJECTIVE

By the end of this training, learners will be able to:

- 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
- Identify how statuses and reports affect the collection

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## OUTLINE

- a. Reports Overview
- b. Expired Holds
- c. Tracer
- d. CNH
- e. In Transit
- f. Note on Statuses and Reports

## INVENTORY

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### COURSE DESCRIPTION

This course will teach you how to run report 17 and use the weeding macro to build an inventory list.

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### OBJECTIVES

By the end of this training, learners will be able to:

- Run report 17
- Run weeding macro

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## OUTLINE

- a. Report 17
- b. Inventory

## SERIALS

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### COURSE DESCRIPTION

This training will provide 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.

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### OBJECTIVES

At the end of this training, learners will be able to successfully:

- Distinguish the differences in magazines and newspapers re: chronology and enumeration.
- Withdraw a magazine
- Withdraw a newspaper
- Check in a magazine.
- Write a RFID tag to a magazine.
- Check in a newspaper.



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## OUTLINE

- a. Terminology
- b. Chronology and Enumeration
- c. CARL.X Serials
  - i. Defaults
  - ii. Check in magazines
  - iii. Check in newspapers
  - iv. RFID
- d. Withdraw
- e. Renewals
- f. Troubleshooting
  - v. Not in CARL
  - vi. Duplicates
  - vii. Received Damaged
  - viii. Claims
  - ix. Dropped / Ceased publications
- g. Contact

## FILL AND WANDER LIST

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### COURSE DESCRIPTION

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

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### OBJECTIVE

By the end of this training, learners will be able to:

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

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## OUTLINE

- a. Fill List
- b. Wander List
- c. Troubleshooting the fill and wander list

## OUTREACH AND CARL.CONNECT

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### COURSE DESCRIPTION

This training will help you create accounts, check out, and check in using CARL.Connect.

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### OBJECTIVE

By the end of this training, learners will be able to:

- Check out material in CARL.Connect

- Check in material in CARL.Connect
- Create an account in CARL.Connect

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## OUTLINE

TBD