

Upgrade Notes on CARL.X 9.6.6 and 9.6.8, CARL.Connect 1.6.2 and 1.6.4, and CARL.Discovery 3.6.1 and 3.6.2.1

CARL.X

1. Tabbing through the phone field of the patron information record will no longer enable the save button. (Bug fix on ticket submitted by MLS)
2. Damage Items Box in Return
 - a. Staff can check the "Damaged Item" box in Return to check the item in as damage status without triggering a hold. If an item is already on Hold Shelf or Hold In Transit, the item will be moved to a Damaged status and the patron will be placed back into the Title Hold Queue as first in queue. Overdue fines are currently not applied. TLC will be working on a solution for a future release.
3. Hold in Transit receipts will now display the Send To branch in the body of the receipt. This would show on the spine of the item for materials that need to be sent to another branch for a hold.
4. Report 62: Claims Never Had will now list the branch where the claim was processed instead of the checkout branch.
5. Report 20: Lost Items has been fixed to not include items not owned by the selected branch.

CARL.Connect

6. Renaming
 - a. "Lists" has been renamed to "manage" and includes damaged items (new: see Circulation below), fill list,
 - b. Not found has been renamed to "wander list".
7. Fill List Updates
 - a. More mobile-friendly, especially for iPads
 - b. Ability to scroll horizontally with the call number and item number columns being locked in place during scrolling
 - c. Hold Action Menu Setting has been added. There are two options:
 - i. When *Above the Screen* is selected, multiple items can be selected then choose found, not found, fill with, item detail
 - ii. When *Within the Grid* is selected, it will operate as it does now, by selecting one item at a time to mark found, not found, fill with, item detail
 - d. Location and Media code filters will only display codes for items in the fill list
 - e. Improvements were made to wander list where it will populate faster
 - f. An issue was found and fixed when using Fill List, if a user sorts a column and then scans an item as found, not found, check in, etc. the action completes and the item is removed from the list, but the list became unsorted.
 - g. Wander List
 - i. "Not Found" has been renamed to "Wander List"

- ii. It now has the ability to “withdraw” and “check in. Actions may be taken against multiple items at one time.
- iii. Includes the following columns: status, status date, and amount of Holds on a BID
- iv. The list is sorted by status date
- v. Items in the wander list will automatically be coded missing after 7 days.

8. Circulation

- a. After scanning an item in Check Out, the cursor will activate in the scanning field
- b. In CARL.Connect Check Out, functionality was updated so patrons with an *urgent note* on their account are unable to check out until the note is resolved.
- c. In CARL.Connect Check In, an issue with backdating has been resolved.
- d. Check In Sounds
 - i. An alert sound plays when any lightbox pops up in Circulation during Check In. This can be turned off in Settings.
- e. Damage Items Box in Check In
 - i. Staff can check the “Damaged Item” box in Check In to check the item in as damage status without triggering a hold. If an item is already on Hold Shelf or Hold In Transit, the item will be moved to a Damaged status and the patron will be placed back into the Title Hold Queue as first in queue. Overdue fines will be applied to the customer’s account.

9. Manage

- a. There is a new option available, “manage” where staff can directly scan material into this screen to change the status of the item to “damage”. They can also view items at their location that have the “damage” status. Items that belong to your branch that are checked in as damaged at another location will also show up on this list.
- b. Items will automatically be coded withdrawn after 14 days.

Catalog

10. Opt-In Email Notifications

- a. When customers update their email address, they will have the option to opt-in to email notifications which will change the flag in CARL.X to “Yes-do send email” (feature addition requested by MLS)

11. Issue Level Holds

- a. Issue level holds are now able to be placed via mobile device

12. Loan History

- a. Customers can see their loan history via mobile device

13. Saved Searches

- a. Customers can view their saved searches via mobile device. They cannot save a new search, only view existing saved searches.

14. Lists

- a. Customers can add to their list and view saved lists via mobile devices

15. Mobile Title Details

- a. Customers will be able to view Title Details via mobile device
16. Reverse Chronological Order for Magazine Issues
- a. In Desktop and Mobile, magazines and periodical issues will display in reverse chronological order, displaying the library's newest issue first.