

Upgrade Notes on CARL.X 9.6.9, CARL.Connect 1.6.5, and CARL.Discovery 3.6.3 1Q Release July 2021

Bugs Fixed and Enhancement Requests Added

- We have confirmed reports that the process to check in items as damaged in CARL.X is not working. Staff navigate to Return in CARL.X, check the Damaged Item box, and then scan the item. It then goes to an On Shelf status rather than to Damaged. Staff have also confirmed that the damaged check in in CARL.Connect is working as expected.
- Holds that are suspended for a library closure. When they are unsuspended, they retain a note of "Suspended" but are actually live.
- Loan History. 1. Printing Loan history will only pull up 20 items, no matter how many display on the screen. 2. There are many times when Print Loan history date range pulls up 0 results even when there are items in that date range.
- When entering Check Out from Library Services in CARL.Connect, there is no lightbox asking whether to override a Blocked library account. The account automatically goes to Blocked w/ Override into the checkout module.
- It would be nice to see User Overview in the User Information screen so all that information is in the same place and so you don't have to go to another screen to see account activity (holds, fines, checkouts, etc.)
- An issue was resolved for Report 11001 (In Transit) where setting the Controlling Branch parameter to Both (In Transit to Branch(es) and In Transit from Branch(es)) would return items that were not In Transit and also wasn't applying the correct number of days, has been resolved.
- An issue was resolved where a Big Red Box would not display if an item was in transit hold and charged to another customer.

CARL.X Features

- Patrons can now renew a title that has a hold on it. If there are more copies on shelf than there are holds on the title, the copy will be renewed. Non-circulating copies *will be considered* when looking at copies on shelf.
- A new patron blocking option has been added. Libraries can choose to block an account based on the number of days an item has been overdue. We are currently tracking statistics on how many items are overdue, how many patrons have items overdue, and the average time that patrons are holding onto their items. Depending on what we see with these statistics, we could potentially use this new blocking threshold in the future. It will not be turned on immediately though.

CARL.Connect Features

- A new Staff View for Loan History has been added. A system setting can be enabled to allow patrons to give staff permission to view their Loan History. If this is turned on, staff would be able to see customer loan history when they access the customer account via CARL.Connect > Customer Account.
- Library staff will now encounter user alerts (counterparts to BRB's in CX) for the following:
 - Account is expired
 - Fines and Fees owed
 - Hard blocks
 - Holds available for pickup
 - Soft blocks (with patron notes viewable)
- Staff will see charge/discharge notes in CC while in Check In
- User statuses now match the statuses in CX
- Damaged Items
 - Holds are split into Title, Item, and Issue holds
 - Action buttons on the screen will only be active once an item has been selected, not when first arriving on the screen
 - Permissions have been added to who has access to Damaged Items and who has permission to delete or withdraw the items on that screen
- More user permissions have been added
- Print receipt formatting has been added so that receipts printed from CARL.Connect look more like those from CARL.X
- User information has been updated to include Full Legal Name.
- Staff Notes have been incorporated into the collapsible fields, and now default to being open when notes are present.
- User notes are now presented in reverse chronological order, with any Urgent notes appearing at the top.
- The RFID toggle and Collections toggle have been removed from the menu (meatballs).
- The User Information page has been reviewed and updated to meet ADA/508 compliance.

Discovery (Catalog) Features

- Series information, when it is available in the MARC record, will be able to be displayed in the Grouped Title Display.
- Overdrive items now sync automatically when a user logs into MyAccount or refreshes their screen if it has been 30 minutes since the last sync.
- Overdrive holds can now be canceled within MyAccount on both desktop and mobile.
- Loan History printing has been improved (see bugs above). Customers can print up to 1000 items at a time. They can also select a specific date range of items in their loan history.