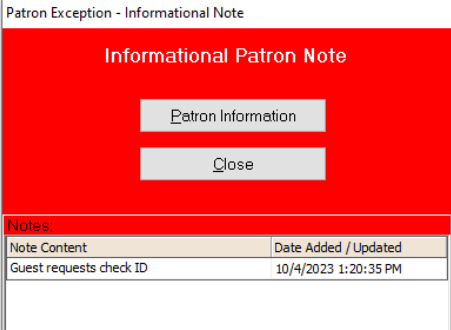# TLC Upgrade Notes

CARL.X 9.7.3, 9.7.5 & CARL.Connect 1.6.9, 1.7

CARL.X 9.7.3 & 9.7.5

Administrative and security features are being added.

Informational Note

This note type was added that is strictly informational. It will display in Charge or Renew only. It will display regardless of the account's status. A workgroup was formed in November 2023 to highlight when we will use Informational Note vs Standard vs Urgent. See CARL Manual for how to use.
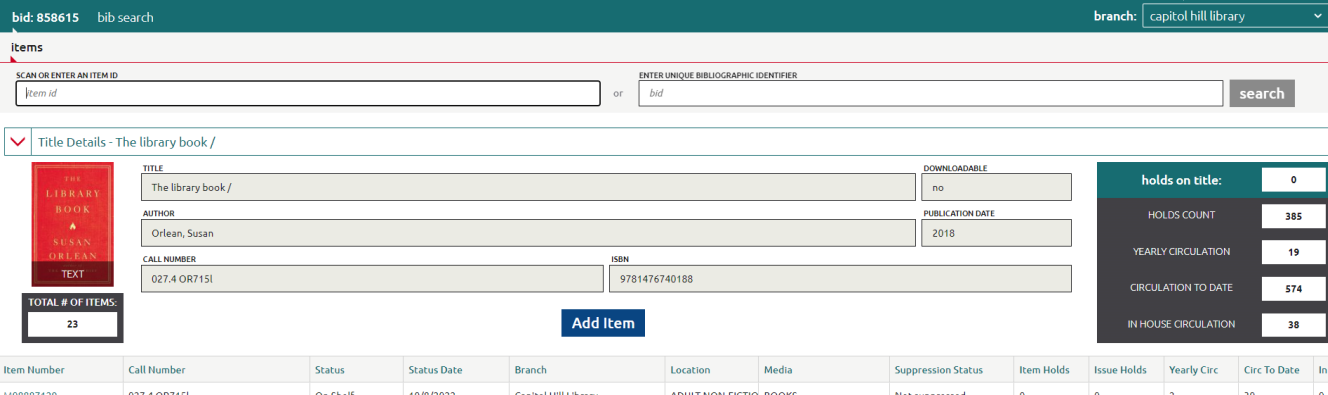

CARL.Connect 1.6.9 & 1.7

During this release, TLC has worked to update Item functionality and look and feel. New style changes are being implemented to assist with usability and accessibility compliance. Main style changes are having yellow updated to purple, and all lower case updated to mixed case.

Items

Title Details has been made collapsible to see more items in the grid. An informational box on the right shows item stats and holds information for the BID.

The **grid of items** displays item number, call number, status, status date, branch, location, media, suppression status, item holds, issue holds, circulations, cumulative circ, and in house circulation.

Title Details - The library book /												
Item Number	Call Number	Status	Status Date	Branch	Location	Media	Suppression Status	Item Holds	Issue Holds	Yearly Circ	Circ To Date	In
M08887129	027.4 OR715l	On Shelf	10/8/2022	Capitol Hill Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	2	30	0
M08887094	027.4 OR715l	On Shelf	6/8/2022	Almonte Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	0	19	2
M08887110	027.4 OR715l	On Shelf	10/9/2022	Belle Isle Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	2	34	1
M09405040	027.4 OR715l	On Shelf	10/1/2022	Belle Isle Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	4	28	4
M08887101	027.4 OR715l	On Shelf	8/10/2022	Bethany Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	1	34	0
M08887138	027.4 OR715l	Missing	11/6/2020	Choctaw Library	ADULT NON-FICTIO	BOOKS	Status Suppressed	0	0	0	22	1
M08887147	027.4 OR715l	On Shelf	9/15/2022	Del City Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	0	24	2
M08887156	027.4 OR715l	On Shelf	9/14/2022	Downtown Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	1	35	14
M08887165	027.4 OR715l	On Shelf	9/28/2022	Edmond Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	3	44	2
M09405059	027.4 OR715l	On Shelf	9/6/2022	Edmond Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	0	32	5
M09405068	027.4 OR715l	On Shelf	9/9/2022	Harrah Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	2	29	1
M09405077	027.4 OR715l	On Shelf	2/15/2022	Jones Library	ADULT NON-FICTIO	BOOKS	Not suppressed	0	0	0	23	0
M08887174	027.4 OR715l	Withdrawn	2/24/2021	Luther Library	ADULT NON-FICTIO	BOOKS	Branch Suppressed,Status	0	0	0	25	0

All item numbers selected from this screen will open as a new tab at the top of the screen. **Item Detail** has information about the title at the top with item notes, item information, chronology and enumeration, and who notes as collapsible boxes. Editable boxes are white and can be modified and saved from here.

Circulation

Manage > Fill List now has a drop-down to filter by "pick up branch".

Manage > Holds is new functionality. This allows staff to interact with holds at their branch quickly and efficiently.

Fields under Manage > Holds are user last name, user first name, user ID, title, item number, status, hold through date, location, and media. For "Expired", the date will show if the hold through date is yesterday or earlier. Action items include:

- Cancel Hold
  - Allows holds that are "hold in transit" or "hold shelf" to be cancelled.

- Clear & Replace
  - Allows staff to clear an expired hold from the hold shelf, but replace the hold for the user.
- Clear Expired
  - Allows staff to process holds that have expired off the hold shelf.
- Update Pickup Branch
  - Allows staff to choose a different branch from the drop down. A new hold slip will need to be printed.
- Extend Date
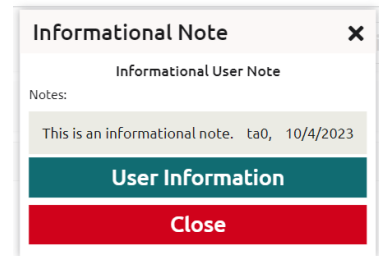 - Allows staff to extend the hold through date of an item on the hold shelf.

User Overview has the option for Claims Returned and Dispute Checkout. Dispute Checkout is new language but the steps taken are the same as Claims Never Had. Claims Returned will not be turned on.

Copy User is available in User Information to clone accounts. When the button is selected, staff will enter a new library card number, first name, last name, date of birth, and what type of card to issue. After selecting "Create New User", staff will be taken to the User Information screen to make additional updates. Copied information includes address information, user settings, opt-ins, and notifications.

The **Staff Notes** section on the User Information page in CARL•Connect Staff has also been updated. From here, Informational Note, Standard Note, and Urgent Note can all be added and edited. The option to choose a predefined note has also been added, and those options correspond with the options available in CARL•X.
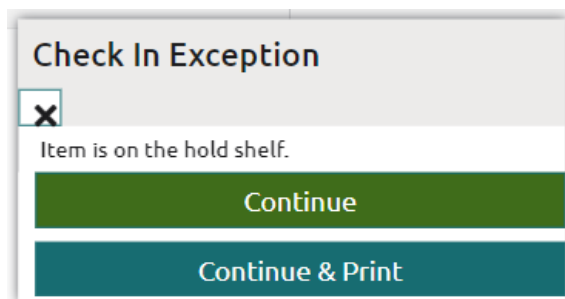
An **Informational Note** was added to CARL.Connect. This note type was added that is strictly informational. It will display in Check out from both User Services and Library Services. The lightbox lists the note, user alias, and a date. Multiple information notes can be on display. It will display regardless of the account's status. If the account is not "See Notes", a "Standard" note will not display.

CARL.Connect Bug Fixes

There are bug fixes related to CARL.Connect in 1.7:

- Advanced birth date searching has been streamlined so that you can enter a date and select "enter" to search. (MLS functionality request)
- An issue was found where a checkout could be completed by a delinquent patron by selecting and subsequently closing the user overview. This has been fixed. (MLS reported bug)
- An issue was found in Manage > Wander List where sorting with author does not work, and that has been resolved.
- An issue was found where in checkout, the hold shelf item lightbox does not close when clicking on the user overview button in the lightbox. This has been fixed.
- User Overview > Checkout column order has been updated to title (locked), item number, call number, status, claimed status, fines and fees, due date, transaction date, transaction branch, item branch, location, and media.
- Updated functionality in Circulation > Check in so that the hold shelf item triggers a check in exception lightbox each time that the hold shelf status item is check in.

- A bug was found where a capital "M" in any field on the user information tab of the user Overview causes Manual Block. This has been fixed. Additionally, the Manual Block Note responds appropriately if there is an attempt to save the block without entering a note.