OWLSnet CARL-X Training Proposal

TLC is offering remote training to system and library staff on all modules and functions of the CARL-X client and database in a series of webinars at the end of June/beginning of July.

In the original plan, in-depth training was going to be offered in person to a limited number of system staff and stakeholders, with more general training for library staff scheduled for August. However, with the current COVID-19 uncertainty and advice against travel and gatherings, OWLS and TLC have developed this new solution.

The online training sessions will be open to all OWLSnet library staff. We request that at least one person from each library commit to attend or view the core training sessions identified below and be responsible for training the rest of the staff at their library. The required sessions are:

- CARL-X Circ (2 sessions)
- CARL Connect Circ/Items (2 sessions)
- CARL Connect Discovery (1 session)

Those libraries using Acquisitions will also need to assign staff to attend or view Acquisitions training (2 sessions).

Each session will be offered once and will last about 3 hours. Where two sessions are noted, both sessions must be watched to get the full training. Each session will be recorded for later viewing, but it is highly recommended that staff watch live or in the same week so they can participate in Q&A sessions with TLC at the end of each week. Questions will be allowed during the core sessions via chat, but they may not be answered immediately.

Additionally, TLC training sessions will cover Cataloging, CARL-X Items, Serials, and Reporting. OWLS plans to train libraries on these functions in a more targeted fashion, but library staff are encouraged to attend these optional sessions if they'd like.

Designated library staff are expected to complete the required training by the end of July and train the rest of their library staff before our go-live date of August 17, 2020. These recordings will continue to be available for training purposes indefinitely.

We will send a registration form to each library to determine who will attend each session and what their technological needs will be.

A list of proposed dates are as follows:

Session	Date
CARL-X Admin Day 1 (3.5 hours) **Recommended audience:** ILS staff and database enthusiasts	6/22/20
CARL-X Admin Day 2 (3.5 hours) **Recommended audience:** ILS staff and database enthusiasts	6/23/20
CARL-X Cataloging Day 1 (3 hours) Recommended audience: Professional or dedicated cataloging staff	6/24/20
CARL-X Cataloging Day 2 (3 hours) **Recommended audience:** Professional or dedicated cataloging staff	6/25/20
CARL-X Cataloging Day 3 (3 hours) **Recommended audience:** Professional or dedicated cataloging staff	6/26/20
CARL-X Circ Day 1 (3 hours) **Recommended audience: Circulation supervisors and power users **REQUIRED	6/29/20
CARL-X Circ Day 2 (3 hours) **Recommended audience: Circulation supervisors and power users **REQUIRED	6/30/20
CARL-X Acquisitions Day 1 (3.5 hours) **Recommended audience:** Acquisitions staff and libraries interested in implementing acquisitions	7/1/20
CARL-X Acquisitions Day 2 (3.5 hours) **Recommended audience:** Acquisitions staff and libraries interested in implementing acquisitions	7/2/20

CARL-X Items (3 hours) **Recommended audience:** Power users who add and edit item records and database enthusiasts *We highly recommend staff use the CARL Connect Staff Items workflow instead of this option	7/6/20
CARL-Connect Staff Circ (3 hours) **Recommended audience: All circulation staff **REQUIRED	7/7/20
CARL-Connect Staff Circ/Items (3 hours) **Recommended audience: All circulation staff, all staff who add or edit items **REQUIRED	7/8/20
CARL Connect Discovery Admin (3 hours) **Recommended audience:** ILS staff and database enthusiasts	7/9/20
CARL Connect Discover Users (3 hours) **Recommended audience: All library staff **REQUIRED	7/10/20
CARL-X Serials **Recommended audience:** Professional cataloging staff and dedicated serials staff *additional training will be provided by OWLS	7/13/20
CARL-X Reports (2 hours am; 2 hours pm) **Recommended audience**: Managers, directors, and collection development staff *additional training will be provided by OWLS	7/14/20

5/14/20