# Sierra to CARL•X to CARL•Connect Functions and Instructions

| CIRCULATION TASKS | | |
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| **Sierra** | **CARL•X** | **CARL•Connect Staff** |
| Add Notes to patron account | • Start in a patron record<br>• Go to the Notes tab (with the light bulb)<br>• Click the "Notes" button near at the bottom of the window<br>• Select Note Type from drop-down<br>• Choose Predefined or Free-Text<br>• Add note<br>• Click Save | • Start in a patron record in User Services<br>• Click the words "Add a Note"<br>• Enter note into the "Note Text" box<br>• Click save note<br><br>*Only standard notes can be added in CARL Connect. Urgent notes must be added in CARL•X. |
| Adding Parent Field/Info | • Start in an existing or new juvenile patron record in the Registration tab<br>• Choose "Sponsor" from the "Which Address" drop down box (on the right)<br>• Enter parent name in the "Sponsor" field under Primary Address (the Secondary Address changes to Sponsor Address)<br>• Enter parent's address in Sponsor Address even if the address is the same as the juvenile's (notices will go here) | • Start in an existing or new juvenile patron record<br>• Check the "secondary address" box under "Address Information"<br>• Under "User Settings" change the "Preferred address" drop down box to "Sponsor"<br>• In "Address Information" the "Secondary Address" changes to "Sponsor Address" with a field for sponsor name<br>• Enter parent's name and address into this section even if the address is the same as the juvenile's (for notices) |
| AltID | Obsolete.<br><br>CARL•X requires staff to search for a patron before registration without needing AltID | Obsolete.<br><br>CARL•Connect Staff requires staff to search for a patron before registration without needing AltID |
| Backdating Returns | • Start in Return<br>• Check the box for "Override Date" after the calendar<br>• Choose the date you want from the pop-up box | • Start in Check In<br>• Check the box for "Override Date"<br>• Choose the date you want from the pop-up calendar<br>• Click "Finish/Save"<br>• Scan items |

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| | • Choose “This Transaction Only” or “Until ‘Override Date’ Canceled”<br>• Click Ok<br>• Scan items | • When finished backdating, uncheck the box |
| Billing for Lost or Damaged Item | • Start in a patron record<br>• Go to the Summary tab<br>• Select “Charges”<br>• Highlight the item you wish to bill and click “Go Lost” at the bottom<br>• A payment window will appear<br>• Click “Pay Later” to bill the item. Alternately, a patron can pay right away from this window | Must be done in CARL•X |
| Check In/Returns | • In the CARL•X Staff client, start in Circulation<br>• Click Return (F3)<br>• Scan the item barcode in the “Enter Barcode” box<br>• Change the Return Date if needed<br>• Close when finished | • In CARL•Connect, start in Library Services<br>• Click “Check In”<br>• Scan the item barcode in the “Scan or Enter an Item ID”<br>• Override the return date if needed<br>• Clear list or navigate away when finished |
| Check Out | • In the CARL•X Staff client, start in Circulation<br>• Click Charge (F2)<br>• Scan patron barcode in the second box that says “Patron Barcode”<br>• Scan items to be checked out<br>• Click Print Receipt<br>• Click “Next Patron” or “Close” to finish transaction | • In CARL•Connect, start in Library Services<br>• Click “Check Out”<br>• Scan the patron card in “Scan or Enter a User ID”<br>• Scan the items in “Scan or Enter and Item ID”<br>• Click “Finish/Receipt”<br>• Select receipt preference (email, print or no receipt—text is not set up)<br>• Click “Finish/Send”<br>• If printing a receipt, you may be prompted to select a printer |
| Claims Never Had – Marking | • Start in a patron record<br>• Go to the Summary tab | Must be done in CARL•X |

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| | • Click "Charges"<br>• Highlight the item the patron claims to have returned<br>• Click "Never Had" at the bottom of the record | |
| Claims Returned – Marking | • Start in a patron record<br>• Go to the Summary tab<br>• Click "Charges"<br>• Highlight the item the patron claims to have returned<br>• In the Claimed area, select the branch the patron says they returned the item at from "Branch"<br>• Click "Returned" next to the Branch drop-down | Must be done in CARL•X |
| Collection Agency Report | TBD | TBD |
| Copy Patron Record | • Start in an existing patron record<br>• In the Registration tab, click "Clone" at the bottom of the screen<br>• Update/add information as appropriate<br>• Click PIN to assign a PIN (it will default to DOB MMDDYY if no PIN is selected)<br>• Click "Register" | Must be done in CARL•X |
| Create New Patron Account | • Start in Patrons (F5)<br>• Enter the patron's name in the Name field<br>• Hit Enter or click the binoculars icon<br>• If a duplicate is found, a pop-up window will show matching accounts. If one belongs to your patron, then either double click on the name or highlight it and click "Select Patron" to make any edits to the account<br>• If none belong to your patron, click, New Patron | • Start in Circulation > User Services<br>• Click "New User"<br>Enter at least first name, last name, and date of birth—with slashes in the date<br>• Click "Register."<br>If a duplicate is found, click the user ID and check the record. If it is your patron, click "Edit This User."<br>• If it is not you patron, click "Close" then, "Continue to Registration" |

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| | • Scan the new patron barcode in ID, move through the registration form filling out as much as possible<br>• Expiration Date will populate to one year from current date. Update as needed for local procedures<br>• Change Type (formerly patron type) as needed<br>• Be sure you fill out Home Agency, Municipality, and County under “Library Statistics”<br>• Click “Register” when complete | • Move through the registration form filling out as much as possible. Data entered in the search page will populate.<br>• Scan the barcode for User ID<br>• Give an expiration date<br>• Select user card type (formerly patron type)<br>• Email notice preference will be under Overnight Email Sending<br>• Opt in is available for email receipts<br>• Be sure to complete Home Agency, Municipality, and County<br>• Click “Save Information”<br>• A digital signature will be prompted. Click Skip if doing paper registrations or have patron sign and “Accept” to finish the process<br>• When finished, you can print the library card, move to checkout, or click “Done” to go back to the new user screen |
| Edit/Update Patron Record (Video) | • Start in a patron record<br>• Make necessary changes<br>• If changing address information, remember to update “Municipality” and “County” information<br>• Click on Save and Close | • Start in a patron record (User Services)<br>• Highlight information to change and overwrite, or select a different dropdown option<br>• Collapsed views can be expanded by clicking the orange arrows<br>• A secondary address can be added by clicking the check box under address<br>• Home Agency, Municipality, and County are under Library Statistics. |

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| | | • Reset PIN is at the bottom of the record—resets to default, DOB MMDDYY |
| Hold Alias | System created in CARL•X. OWLS may need to set up a special template. | System created in CARL•Connect Staff. OWLS may need to set up a special template. |
| Home Agency | Home Agency is located at the bottom of the patron record under Library Statistics. Please select from the drop-down options and verify every time a patron's information changes. | Home Agency is found in the Library Statistics section of a patron's record. Select from the drop-down menu. Verify every time a patron's address changes. |
| Linking Patrons | NA | In development. Expected for early 2021 release |
| Lost – Marking | • Start in a patron's record<br>• Select the Summary tab<br>• Select "Charges"<br>• Highlight the item you wish to bill and click "Go Lost" at the bottom<br>• Click "Pay Later" to bill or continue with payment immediately | Must be done in CARL•X |
| Manual Blocks on patron accounts | Start in a patron record.<br>To place a hard block, which will prevent checkouts, choose status Restricted.<br>• A pop-up says "Borrower Note Required."<br>• See "Add Notes to patron account" above for instructions.<br>• Click Save at bottom right when finished.<br>• When the patron record is next opened, a red box will say "Manual Hard Block – Check Borrower Notes."<br>• Click Patron Information to proceed. This will open the patron record in the Notes view.<br><br>To place a soft block, choose Alert. | |

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| | • You will not be prompted to add a note, but please do!<br>• When the patron record is opened in Charge you will see a red “Patron Soft Block” window with the Notes content.<br>• You can Clear Block, Override Block, or go to Patron Information.<br><br>Block and Block Overridden cannot be manually applied.<br><br>Block is automatically applied when the patron meets block criteria as configured in the system.<br><br>Block Overridden is automatically applied when staff override a block in order to allow a patron to use their account.<br><br>[More to come on system blocks] | |
| Merge Patrons | Must be done in CARL•Connect Staff | • Start in Circulation “User Services”<br>• Click “Merge Users”<br>• Enter the patron barcode in first field OR type in name in second field<br>• Search<br>• Select the primary patron to merge from the results list<br>• Choose the secondary patron from this list of results OR search for another patron to pull another list.<br>• Click on the secondary patron.<br>• Verify primary user information |

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| | | • Once the record is accurate, click on the green button, “Merge Users” |
| Modify Due Dates | *Must be done before scanning the item during checkout<br>• In Charge (F2), bring up the patron by scanning the barcode or searching<br>• Check the “Override Due Date” box<br>• Select the new due date from the pop-up calendar window<br>• Select the appropriate “Apply Due Date To” option<br>• Click “OK” | *Must be done before scanning item during checkout<br>• After scanning the patron’s barcode, and BEFORE scanning the items, check the box “override due date.”<br>• From the pop-up calendar, select the new due date.<br>• Click “override due date.”<br>• Scan the item with the new due date. |
| Municipality | Municipality is located at the bottom of the patron record under Library Statistics. Please select from the drop-down options and verify every time a patron’s information changes | Municipality is found in the Library Statistics section of a patron’s record. Select from the drop-down menu. Verify every time a patron’s address changes. |
| Notices (printing overdues and hold pickups) | In progress—likely a processed at OWLS and emailed to libraries | In progress—likely a processed at OWLS and emailed to libraries |
| Offline Circ | • Offline circ will automatically initiate when the server loses the connection<br>• Open the CARL•X Staff client<br>• An error message will display “No Circulation Server Available”<br>• Click “OK”<br>• A big, red box will ask if you’d like to use Offline Circ<br>• Click “Yes”<br>• Scan the patron’s barcode in the Charge tab<br>• Separate patron’s items by format and/or due date<br>• Scan the item barcodes<br>• Check the due date is correct—it automatically defaults to 28 days<br>• Enter | Must be done in CARL•X |

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| | <ul><li>Click “Next Patron” or “Print Receipt”</li><li>When back online another big, red box will display informing you data can be uploaded</li><li>Click “OK”</li><li>When a confirmation message says the upload is complete, click “OK” again</li><li>Contact OWLSnet Help to let us know you uploaded a file. We will process it immediately</li></ul> | |
| On the fly (video) | <ul><li>While checking out a patron in the Charge function, a big, red box will appear if the item is not found prompting you to create a temporary item</li><li>Follow the prompt to create a temp item</li><li>Scan the item ID, Title, and any other information you wish</li><li>Click “Create Temporary”</li><li>Upon check-in (in CARL•X) a message will pop up alerting staff that a temporary item has been scanned</li></ul> | <ul><li>An error will pop up if an item isn’t found while checking out a patron</li><li>Click “Cancel” or the x to close the window</li><li>Open another browser tab and log in to Items</li><li>In the second search box you can Enter BID 887526, or go to bib search and search for “on the fly”</li><li>Find the general on-the-fly record and “Select Back” this record</li><li>In the item view, click “Add an Item”</li><li>Scan the barcode</li><li>Edit any other fields you wish (many may not be important right now</li><li>Click “Save Item”</li><li>Go back to the checkout browser</li><li>Scan your new on the fly item.</li></ul> |
| Paging Lists | This is called “Router” in CARL•X<br><ul><li>Go to the Circulation menu along the top</li><li>Select “Router”</li></ul> | This is called “Fill List” in CARL•Connect Staff.<br><ul><li>Start in Circulation > Library Services</li></ul> |

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| | • Select which list you'd like to pull (title, issue, item). You'll have to run all three to get all the holds<br>• Branch information will default to the branch you are logged into; however, you can select your branch from the dropdown menu and click "Go" if you don't see anything<br>• Sort the flex grid by any field you wish by clicking on the header<br>• Right-click on the grid and click "Print" to print the list as is or click "Print" at the bottom of the page | • Click "Fill List"<br>• Narrow your search using the drop-down menus and/or sort by clicking the headers<br>• Highlight the item you wish to pick<br>• Select one of the following options:<br>    ○ "Found" will take the item off the pick list, but not put it on the hold shelf or in transit yet. You will need to check the item in to put them on the hold shelf or in transit<br>    ○ "Check In" will fill the hold immediately and print a slip<br>    ○ "Not Found" will remove the item and give it a status of "not on shelf". You can see a list of these items in the "not found" tab<br>    ○ "Fill With" will open a new page which will allow you to select which item will fill the hold<br>• Once you make your selection the item will disappear from the list |
| PIN – Change | • Start in a patron record<br>• Click the "PIN" button at the bottom of the record<br>• Enter the current PIN (if known) in "Old PIN"<br>• Enter the PIN the patron would like in "New PIN"<br>• Enter new PIN in "Confirmation" | Changing to a user-defined PIN must be done in CARL•X.<br><br>Resetting a PIN can be done in CARL•Connect Staff. |

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| | • If "Old PIN" is not filled in, enter your CARL password into "Staff Password"<br>• Click "Save" | |
| PIN – Reset | • Start in a patron record<br>• Click the "PIN" button at the bottom of the record<br>• Enter the current PIN (if known) in "Old PIN"<br>• Enter the 6-digit default PIN for birthdate in MMDDYY format in "New PIN"<br>• Enter default PIN again in "Confirmation"<br>• If "Old PIN" is not filled in, enter your CARL password into "Staff Password"<br>• Click "Save"<br><br>*Patron PINs with not transfer in the migration. They will be reset to the 6-digit date of birth from the patron record in MMDDYY format. CARL will also create a default PIN to that format. | • Start in a patron record<br>• Click "Reset PIN" at the bottom of the record<br>    ○ Note: this will only reset the PIN to the 6-digit default PIN of MMDDYY<br>• Last updated date will appear below the button<br><br>*Patron PINs will not transfer in the migration. They will be reset to the 6-digit date of birth from the patron record in MMDDYY format. CARL will also create a default PIN to that format.<br><br>**Patrons can change their PIN in their InfoSoup account |
| Print a Receipt for Items checked in | • Check in items in Returns (F3)<br>• Highlight the items you wish to print a receipt for<br>• Select your library's check in receipt from the "Patron Receipt" drop-down<br>• Click "Print Receipt" | |
| Printing Transit Slips | • Check in items through Returns (F3)<br>• A big, red box will display alerting you there is a hold on the item and it should go into transit<br>• Click "Print Receipt"<br>• If you didn't click "Print Receipt" you can highlight the item in the Returns grid, select | |

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| | the “Hold/In Transit Receipt” from the Patron Receipt drop-down and click “Print Receipt” | |
| Printing a receipt with all the items a patron has checked out | More soon | More soon |
| Renewing Items | • Click on the Renew function under the Circulation tab.<br>• Select either Patron ID or Item ID from the “Enter” dropdown. *If renewing with physical item, use Item ID. If renewing with no item, use Patron ID to pull up their account.<br>• Scan in the patron barcode or item barcode into the next field to pull up the record *Or you can search for a patron by using the Patron Browse field.<br>• Select the item(s) to be renewed.<br>• Click “Renew” with the blue book icon near the bottom of the screen.<br>• You will be notified by the system if the item(s) cannot be renewed.<br>• Once renewed, click “Close.” | • Click “My Account” in the patron’s record. A new browser tab will open with more information<br>• Select “Loans” on the left side<br>• Click the orange “Renew Loan” button under the eligible item<br>• Close the browser tab when finished making changes to the patron’s account |
| Replacing Library Cards | • Open the patron’s record<br>• Scan the new barcode in the ID field<br>• Go to the Registration tab<br>• Under Library Statistics, find the “Replaced Card” field<br>• Enter the replacement number, initials, library and date. For example: #1 AL/OWLS 08/12/20<br>• Click “Save”<br><br>To add the Lost fee<br>• Go to the Fees tab | • Open the patron’s record<br>• Scan the new barcode in the User ID field<br><br>• Under Library Statistics, in the Replace Card field, enter the replacement number, initials, library and date. For example: #1 AL/OWLS 08/12/20<br>• Click “Save Information”<br><br>To add the Lost fee in CARL•X<br>• Go to the patron’s record<br>• Go to the Fees tab |

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| | • Select Replacement Fee from the Library Fee dropdown menu<br>• Click the “Write Library/Service Fee(s)” button<br>• If the patron isn’t paying now, click “Pay Later”<br>• When finished, click Save | • Select Replacement Fee from the Library Fee dropdown menu<br>• Click the “Write Library/Service Fee(s)” button<br>• If the patron isn’t paying now, click “Pay Later” |
| Search for Patrons | • Start in Patrons (F5)<br>• Type in the entire name or parts of the name in the Name field<br>• Hit enter or click the binoculars next to the field<br>• OR click the binoculars without typing anything to pull up an advanced search window where you can Keyword search or Browse by typing in part of a name, address, email, date of birth, etc. | • Click User Lookup in User Services<br>• Scan library card number (barcode)<br>• OR search by keyword from any field in the record (name, email, address, phone number, etc.) |
| Searching for Items | • On the left side, go to Item Maintenance > Item Information (F6)<br>• Scan the item barcode in the Terms box with the default Key term of “Item Number” and press <Enter><br><br>• If the item barcode isn’t known, change the Key drop-down to something else<br>• Enter search criteria in Terms<br>• Press <Enter> or click the binoculars<br>• Item results re shown below | • Start in Items. There are three ways to search:<br><br>Direct Item Lookup<br>• Enter the item number/barcode in the Item ID field. The item will display first with additional items attached to the bib below<br><br>BID search<br>• Enter the BID into the BID field. This is comparable to the Sierra bib number<br><br>Bib Search<br>• Click “Bib Search” to move you to the staff view of CARL•Connect |

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| | | • Search the same way you can in Infosoup, such as by title, author, ISBN, etc.<br>• Click the green "Select Back" button move the item back to CARL•Connect Staff |
| View last 5 patrons to have an item | • In the Item results list, double-click or Edit the record<br>• In the new window that pops up, click "Who Had It" in the Statistics tab<br>• The last patrons to have the item are displayed | • In the Item List, click the Item Number<br>• In Transaction Detail, under the item information, click the orange arrow to open the "Who Notes" (if not already open)<br>• "Who has it" will display the last patrons to have the item |