

Good morning and welcome to CARL Basics 101. I am Molly Komp and I am the training librarian for OWLSnet. With this being a newer position for me and wanting to really grasp the needs of library staff in terms of training, I wanted to create a session that would go over some basic content that would not only help newer staff but also highlight every day library language.

Lingo??

location codes

CARL-X

user/card type

media codes

OPAC

OWLS

library codes - "van" codes

Connect

ILS

status or blocks

NFLS

I don't know about you but when I first started in libraries about 10 years ago, I was a little confused by the words, and acronyms and overall lingo my coworkers were using. We see these and hear these but why? Where did they come from? What do they mean and where can I locate documentation on them?

Today's Goals



What these all mean



Where to find documentation



Confidence in communication

Well, today, we will cover all of that! I will go over what each means, where you can locate the documentation on them and then hopefully, by the end, you will have gained a little more confidence and understanding of library lingo.

OWLS

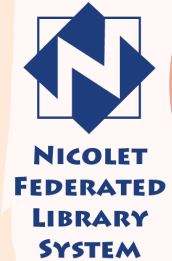
Outagamie Waupaca Library System:
Public libraries from the Outagamie and
Waupaca Counties. Provides services to
the libraries to better serve their patrons.



To start, OWLS. This is the Outagamie Waupaca library system and consists of the public libraries in those two counties. OWLS provides the following to the libraries to better serve their patrons: borrowing privileges, interlibrary loan, delivery, library development, resources, technology and outreach. OWLS is one of 15 library systems in the state of Wisconsin. And Bradley Shipps is the director.
This is the OWLS logo with the blue in it.

NFLS

Nicolet Federated Library System:
Public libraries and branches from Brown,
Door, Florence, Kewaunee, Marinette,
Menominee, Oconto and Shawano Counties.
Provides services and resources to the
libraries to better serve their patrons.



Next is NFLS. This is the Nicolet Federated Library System. And consists of 15 member libraries through 42 library outlets throughout Door, Florence, Kewaunee, Marinette, Menominee, Oconto and Shawano Counties. Again, one of 15 systems in the state of Wisconsin, in which they provide cost effective and efficient access to resources, support, expertise. Tracy Vreeke is the director.
And this is NFLS's logo.

OWLSnet

The Shared Automation Network:
OWLS and NFLS sharing the ILS.
Both have access to patrons and items.
Provides training, technical support, email
service, etc.



This next one is OWLSnet. This can get confusing at times, but what you need to know is that OWLSnet is the shared automation network. Meaning, while each system is a stand alone library system, we also share the ILS and many of the services. It is a consortium of two library systems.

OWLSnet provides services to both systems such as training, interlibrary loan, resource sharing, technical support, WISCAT, and more.

Each system provides staff for support of OWLSnet. This is the logo for OWLSnet. Notice the green and the word "net" in there. The difference between the two logos are the color (blue and green) and the added "net."

ILS

Integrated Library System:
The software a library [system] uses to
collect and manage item and patron
information

Alright, ILS, we hear this one a lot and it can be confusing if you're newer to the library field. We love our abbreviations and acronyms! But think of this one as the heart of library data. The ILS is the Integrated Library System and it's job is to keep all of our item and patron information organized and manageable. It is one gigantic database of information that we can access any time.

TLC

The Library Corporation:
The company that created, develops and
maintains our ILS



Now, TLC, this is the software company who created the ILS we use. We work with them very closely on updates, issues, concerns, and modifications on the product that we feel is necessary for everyday workflows.

CARL-X

The installed ILS client staff use on their desktops

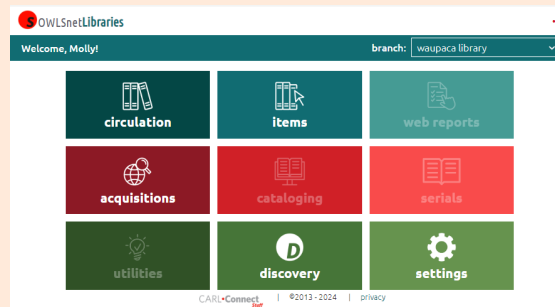


CARL is the ILS we use to create, manage and maintain item and patron information. CARL is our ILS and that is an umbrella to two different platforms.

One of the two platforms within CARL TLC created was CARL-X. This is installed on the computers and can only be accessed on the computer or laptop it was installed on. Here is the icon you see on your desktop.

CARL Connect

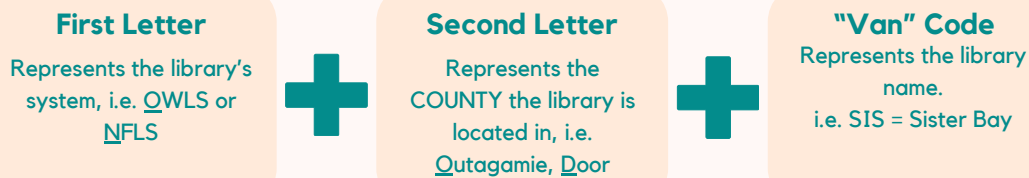
The web or cloud-based version of
CARL.



The second platform TLC created within CARL is CARL Connect Staff. This is the web version that staff can access by using an internet browser. Many ILS vendors are moving towards web or cloud based platforms and TLC is no different. Staff can only access CARL Connect Staff if they are on our network. So, this can't be accessed from outside the library.

Library Codes

Before CARL we had "van" codes in the database to identify the libraries. Typically these are three letters that represent the library. After CARL we needed library codes to be 5 characters. Without drastically changing the van codes, we came up with the following:



Okay, that was the easy stuff. We're going to move into the more system related or backend concepts now...

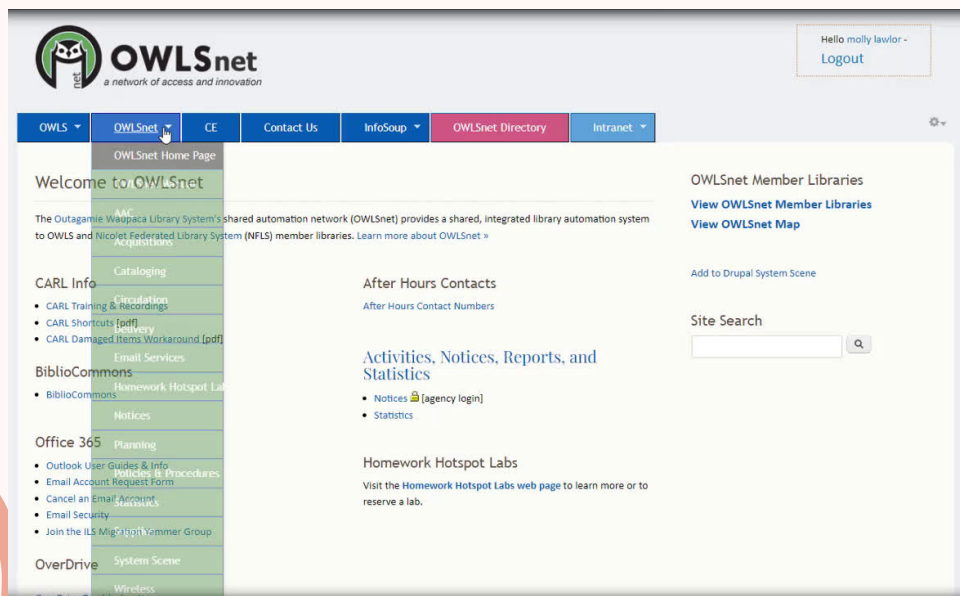
Library or branch codes. These are the codes we use within the ILS to identify libraries by shorthand. Prior to CARL we referred to these as "van" codes. This was a simpler way to manage delivery. The "van" codes were three letters and they represented the individual library.

Now, migrating to CARL, we needed to create branch codes that had 5 characters. We wanted to keep the existing codes so we came up with this method to keep them as familiar as possible. The first letter of any branch codes is the system in which the library belongs. if the code starts with an O it is an OWLS member. If it begins with an N it is a NFLS member.

The second letter represents the county in which the library resides in. For example, if the second letter is an O it could be Outagamie county or Oconto county. If it is a D it is Door County.

And now the last three letters of the branch codes are the original "van" codes. if we go with Sister Bay, we would have NDSIS.

Where to find them?



We do have multiple documents posted on the OWLSnet website for a list of branch codes. As seen here, you would go to the website and then under the OWLSnet tab, choose Circulation, and then scroll to where you see "Codes." We have one where it lists them by code and then one listed by branch name.

Media Codes

Media codes tell CARL HOW an item should check out. There is a 5 character limit. There are many boxes we need to check when we are creating a media code. Every item in CARL has a media code assigned to it.

First Letter

Indicates the audience the media belongs to, i.e. A for adult collections, C for children's and T for Teen.



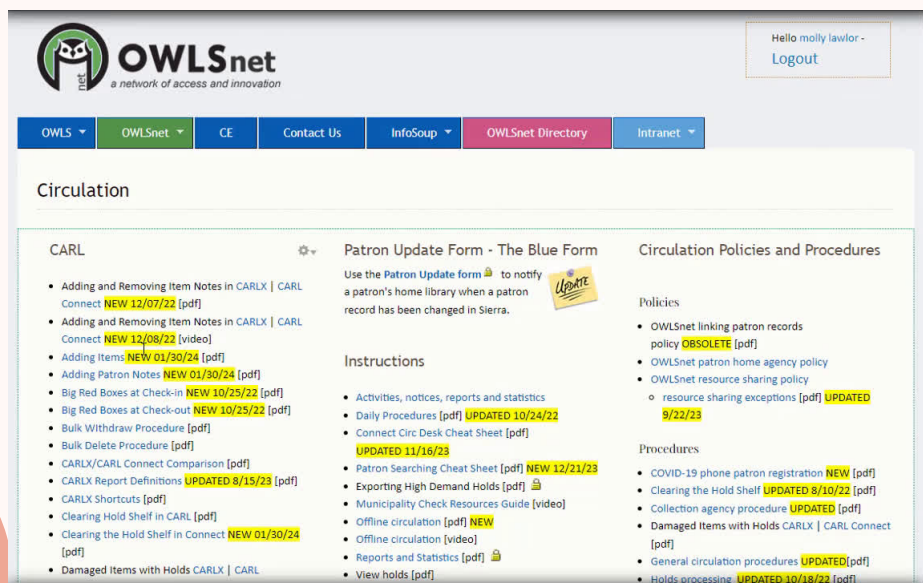
Remaining Letters

Indicate the material or format type of the item, i.e.
ACD = audiobook CD,
V4K = Video 4K

Alright, media codes. Media codes are HOW we tell CARL to assign loan rules to items. Media codes have a limit of 5 characters and typically identify the material type of the item. We give every item a media code and then we assign rules to those specific codes. This tells CARL, "hey, when this item with this code is checked out, it should circulate for X amount of days." This also attaches renewals to items, hold accessibility, and checkout limits. Staff can request new media codes, but OWLS will review the overall need of the code prior to creation.

Examples on screen.

Where to find them?



The lists of media codes are posted in the same area as the Branch Codes. We do have multiple documents posted on the OWLSnet website for a list of media codes. As seen here, you would go to the website and then under the OWLSnet tab, choose Circulation, and then scroll to where you see "Codes." We have one where it lists them by code and then one listed by branch name. We also have a document that shows the media codes and the system level rules applied to them. This document comes in handy when trying to decide what media code to assign to newer items or a new collection.

Location Codes

Location codes tell CARL WHERE an item should be in a given library.
Location codes have a 6 character limit.

First Letter

Indicates the audience the location belongs to, i.e. A for adult collections, C for children's and T for Teen.



Remaining Letters

Indicates the collection, i.e.
VDWES = Video Western,
PICBK = Picture Books

Next, we have Location Codes. Location codes are collections in which library staff, and patrons, can locate collections within the library. Rules aren't typically applied to these, but they can be if we need to. An example of this would be, the Location Code Storage. We have this set at the location code level to circulate with an override. We have very few of these, but it is an option if we need to set rules at the location level.

The code itself follows the similar pattern of media codes. Except we can use 6 characters instead of 5. The first letter will always identify the audience and the remaining letters will be the abbreviated version of the name or topic of the collection. As close to the abbreviated version with 5 characters.

Where to find them?

The screenshot shows the OWLSnet website interface. At the top, there's a navigation bar with tabs: OWLS, OWLSnet (selected), CE, Contact Us, InfoSoup, OWLSnet Directory, and Intranet. A user greeting 'Hello molly lawlor - Logout' is visible in the top right. Below the navigation bar, the 'Circulation' section is active. It contains three main columns of links and information:

- CARL**
 - Adding and Removing Item Notes in CARLX | CARL Connect **NEW 12/07/22** [pdf]
 - Adding and Removing Item Notes in CARLX | CARL Connect **NEW 12/08/22** [video]
 - Adding Items **NEW 01/30/24** [pdf]
 - Adding Patron Notes **NEW 01/30/24** [pdf]
 - Big Red Boxes at Check-in **NEW 10/25/22** [pdf]
 - Big Red Boxes at Check-out **NEW 10/25/22** [pdf]
 - Bulk Withdraw Procedure [pdf]
 - Bulk Delete Procedure [pdf]
 - CARLX/CARL Connect Comparison [pdf]
 - CARLX Report Definitions **UPDATED 8/15/23** [pdf]
 - CARLX Shortcuts [pdf]
- Patron Update Form - The Blue Form**

Use the **Patron Update form** to notify a patron's home library when a patron record has been changed in Sierra.

Instructions

 - Activities, notices, reports and statistics
 - Daily Procedures [pdf] **UPDATED 10/24/22**
 - Connect Circ Desk Cheat Sheet [pdf] **UPDATED 11/16/23**
 - Patron Searching Cheat Sheet [pdf] **NEW**
- Circulation Policies and Procedures**

Policies

 - OWLSnet linking patron records policy **OBSOLETE** [pdf]
 - OWLSnet patron home agency policy
 - OWLSnet resource sharing policy
 - resource sharing exceptions [pdf] **UPDATED 9/22/23**

Procedures

 - COVID-19 phone patron registration **NEW** [pdf]
 - Clearing the Hold Shelf **UPDATED 8/10/22** [pdf]

The lists of location codes are posted in the same area as the Branch Codes. As seen here, you would go to the website and then under the OWLSnet tab, choose Circulation, and then scroll to where you see "Codes." We have one where it lists them by code and then one listed by branch name.

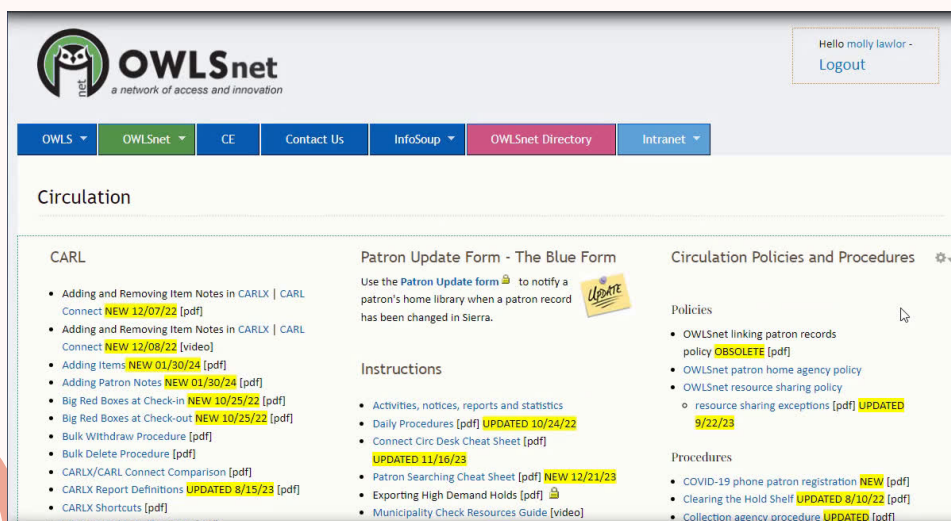
User Card Types

The user card type is a field in the patron record that tells CARL to assign specific rules to that patron account. We assign these rules on the backend so that every time a patron card is scanned CARL knows what limits to give it.

- Adult
- Juvenile
- Juvenile no internet
- Community Card
- Book Club Card
- Institution
- Internet Only
- Online
- Teacher
- ILL
- Display

The most common user card types used is Adult and Juvenile. These are what staff will use probably 90% of the time when they are creating a new card for a patron. However, there are times when a patron requires a different card type option, or staff need to create cards for programs or internal purposes. And because of that, I'll go over all the differing cards types we have in CARL. These are most of them to the right of the screen but there are a few more.

Where to find them?



There is a document on the Circulation page of the website that contains all the user card types, a brief description as to what they are used for and then their blocking thresholds or their backend limits.

Let's go through this to give a little more information on them.

Adult and juvenile cards are those that you will use most of the time. Juveniles are those under 18.

Juvenile No Internet are those under 18 whose parent or guardian denied them internet access.

Employee, if you work in an OWLS or NFLS library then you should have this user card type. These cards don't accrue fines, however, they can be billed.

Community Cards are for specific libraries that choose to use them. These have strict limits designated by the library who chooses to use them. An example for use would be for patrons who do not have a permanent address to list but staff want to still give access.

Book Club Cards are for book club leaders that place all the title holds for the club and then pick up the items to disperse.

Institution, I will talk in conjunction with the Teacher cards. These are very similar in use, however, the major difference is, Institution cards hold the institution as a whole responsible for lost, billed

or damaged materials. Teacher cards, the individual teacher who signed up for the card is responsible. Institution cards do NOT have to be for educational purposes, whereas Teacher cards do.

Internal cards are for library staff to use for internal purposes. Such as technical services uses an Internal card to check things out to repair, or programs checking materials out for library programs, etc.

Internet only are for patrons who are only allowed to use the public computers and not check materials out.

Online registration are those cards that were created from our online form. These cards are only good for 30 days and patrons MUST come into the library to update this to a regular card or it will get deleted.

Walking Books are for patrons who cannot physically make it to the library so they have someone else pick up and return their materials for them. This info typically goes into a Note field.

ILL cards. We have two types for these: Other Libraries and WISCAT. The difference between these are ILL requests that come specifically through WISCAT, and those that do not. They may come from a library not in WISCAT and they may call or email you to request an item. That account would be marked as an ILL Other Library account.

Display cards are for specific collections to be placed on display at a non-owning library. So if a library is deciding to promote a specific topic or theme, they can request materials from other libraries and when they receive them, they check them out to the display card. Patrons can browse these collections and check them out. Once the patron returns the materials, they would get sent back to the owning branch. Display cards CANNOT request high demand or in season or popular titles for display.

Statuses, Blocks and Notes

Statuses

Status is a field in the patron record that indicates the patron's standing. These have backend thresholds attached to them that can limit a patron's use. All but Hard Block can manually be added on or taken off.

Notes

Notes can be used on their own or coincide with statuses. Standard and Informational Notes do NOT stop a patron from using their card. However, an Urgent Note will.

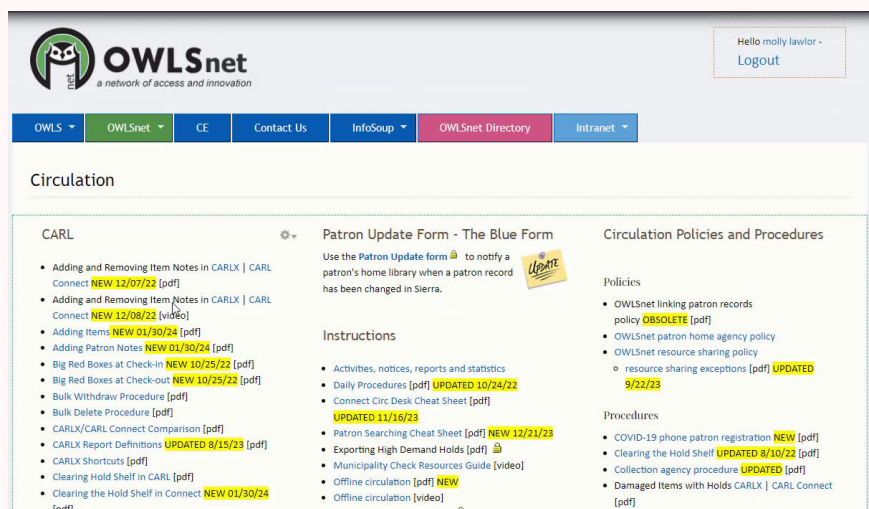
Alright, Statuses. In our old ILS, we referred to these as Blocks, as they would block a patron from using their account. Now, CARL refers to these as Statuses, however, some of the Statuses have "block" in the name, so we use these interchangeably.

Status is a field in the patron record that will tell the system whether they are in good standing or not, in order to check out. Each one has it's own meaning and rules that tell the system how to limit the patron if needed. Overnight, the system runs processes that checks all patron records. If a record meets the thresholds for a Hard Block, the system will automatically put this on. Staff CANNOT add or remove a Hard Block.

Now, Notes can be used on their own or with a Status. Depending on the note you choose, will determine if the account is blocked.

We'll take a look at the Status and Notes document to go over this in more detail.

Where to find them?



Again, you can find this document on the Circ page of the website under Procedures and Patron Registration procedures.

So here we have the status or note name, the definition or meaning of it and then a brief example as to when you might use it.

First, a Good status, is what we want all patrons to have. This means, a patron is in good standing and can access their account, as long as there is not Urgent Note on the account.

Hard Block - this status is a system status and can only be put on and taken off by the system. This is a process that happens overnight. Hard blocks will completely block the patron from placing holds or checking out. This will get put on to an account if the patron owes more than the blocking threshold of \$5 OR they have at least one billed item, could be less than \$5.

Manual Hard Block - This functions the same as the hard blocks however, it is manual, so staff can add this on and take off as needed. This also requires a note be added for use. Notes help staff understand a particular situation they may not be involved in.

Overridden - so this is a system generated status, however, it is triggered by an action by staff. An account that is Hard blocked, can be overridden. Staff will get a window pop-up asking if they want to override the status or cancel the transaction. If staff click on Override, then the system will change the status to Overridden, thus allowing for staff to check out to the patron. Now this should only be done if the items being checked out are your own, and you are comfortable

overriding for the patron.

Soft Block - we no longer have use for this status, now that we have the informational note. Feel free to continue using this, however, know that it does not block the patron in any way and it does not have any sort of pop-up window notifying staff of it.

Urgent Note - Adding this note to an account will block the patron from checking out, even if they are in Good status. When the patron barcode is scanned in through the charge function, a window will come up indicating there is a note that needs resolving. In order to move forward with the patron, the note needs to be removed.

Now, Urgent/Revoked - similar to the Urgent Note except this is for those patrons who have had their privileges revoked, they've been banned, etc. If you are using this please keep in mind that revoking a patron's privileges may require a director to sign off on it.

Alright, the Informational note. This is a new feature in CARL and we're very excited about it. In order to make a note pop-up without blocking a patron, staff should use the informational note. This is nice in that staff can inform staff of current or known issues with the account, by having a window come up when the patron barcode is scanned through the charge function.

The standard note is similar to the informational, except it will not have a window pop-up to notify staff of the note. These can be added for historical purposes or a sort of paper trail.

That was a lot of information. but I wanted to briefly go over the different types of statuses to make you more familiar with them and their use.

OPAC

Online Public Access Catalog:
Our system OPAC is called InfoSoup
This is where patrons can access materials to
place on hold.



now, stay with me! We have one more to go over! And that is the OPAC! The OPAC is the online public access catalog. It is the catalog patrons access to browse titles and then place holds if needed. Our OPAC is called InfoSoup. You may see or hear of two different versions of this, but you just need to know that InfoSoup is our OPAC.

Amanda has a session this afternoon on the catalog and BiblioCommons if you'd like more information on that.