

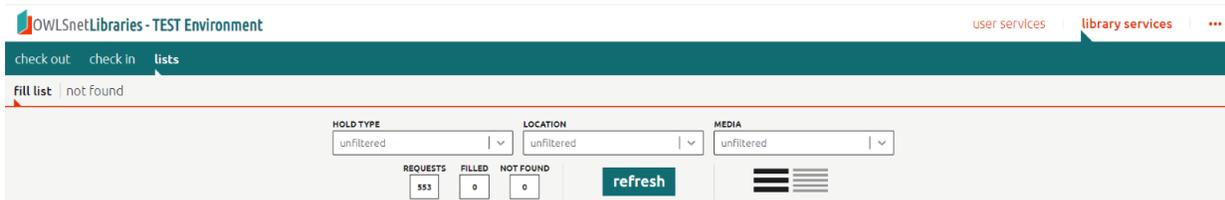
# CARL Conversations: April 7<sup>th</sup>, 2021

## Topic: Router and Fill Lists

### Question and Answer Session

1. How do you access the Fill List in CARL Connect Staff?

After you login, you want to click on Library Services in the top-right corner, then Lists, and Fill List.



2. How would I filter or sort my list? Can we do this?

Yes! To sort your list, you can click on any of the headers and it will sort A-Z or Z-A, depending on your preference. To filter your list, you can choose one of the drop-down menus to select what items you would like to see. You can choose from: Hold Type, Location, or Media. You can select one option or multiple options by using Ctrl+Click. You also don't need to filter in order to sort. You can sort on any header without filtering the list.

3. Can you print the CARL Connect Fill List?

No, you can't print this one in a way that would look ideal. You can try changing the width of columns and the fit to page size, but it could take some work to be useable. You can print the Routing List, though, in CARL-X in an easily readable format.

4. What does 'Not Found' do to an item if I select that option?

If you select 'Not Found', the item will come off the list, the status will get updated to 'Not on Shelf' and then move to the Not Found List. If it is a title level hold and is available at another library, then the item will appear on their list once the overnight processes run. After 2 weeks of being 'Not Found', the item will change to 'Missing.'

5. What does 'Found' do to an item if I select that option?

If you select 'Found', the item is removed from the fill list and changes the status to Hold Pending. THIS DOES NOT UPDATE THE ITEM TO HOLD SHELF OR HOLD IN TRANSIT. You will still need to take these items back to the circ desk to check the items in through CC Staff or CX Staff. This step will then update the status to either Hold Shelf or Hold in Transit.

6. What happens if I mark the item as 'Found' but then never scan it through Returns?

If you mark an item as 'Found' but then never check it in to put the item in Hold Shelf or Hold in Transit status, the item will then update to Not on Shelf overnight.

If the request was a title hold, and available at another branch, it will end up on their list overnight. If it was an issue hold, and available at another branch the item will be moved to the fill list there.

7. What does 'Check-In' do to an item if I select that option?

If you select 'Check-In', an exception box will appear asking to send the item to 'Hold in Transit' or to the 'Hold Shelf'. Staff can either pick "continue" or "continue and print". Continue will move the item to either the hold shelf or hold in transit. Continue and print will do the same but will also print a slip. If staff choose to continue and print, a new browser tab will open showing the print preview and asking for the printer choice. Once the slip prints, the tab will close and take you back to Carl Connect Fill List.

8. What does 'Fill With' do to an item if I select that option?

If staff select 'Fill With', a new page will open displaying all the items in your library that can also fill the hold. From here, you can select the item you want to use to fill the hold by tapping the item and then choosing Found or Check In button.

If there are no more holdable copies at your library, you'll get a message saying, "Unavailable item no other items found on shelf". The Fill With option is not available for Item Level Holds.

9. What does 'Item Detail' do to an item if I select that option?

Selecting this will give you a box with the item information: title, author, item id, call number, etc. You can 'X' out of that when you're done and then choose the option you'd like for the item.

10. Are there any restrictions on what kind of tablet to use for CARL Connect?

No. You can use an old iPod, phone, tablet, laptop, any thing mobile. As long as it can connect to the internet and our network, you can use it.

11. Can you sort the columns for the Router List, too?

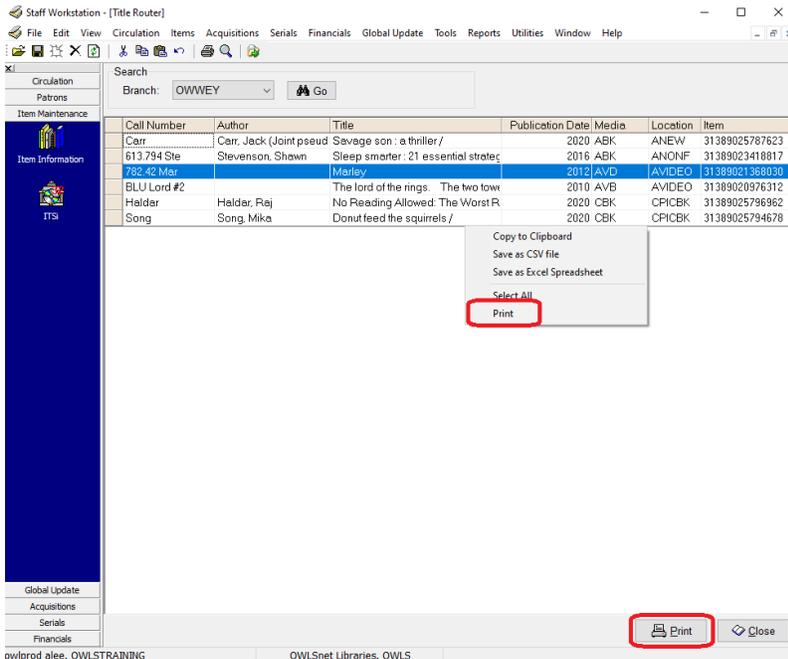
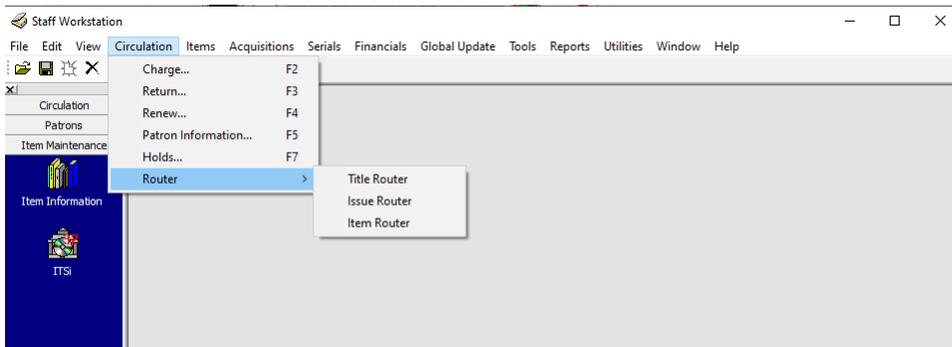
Yes! You can sort the columns for the Router List by any of the headers. You just can't filter it like you can for the CARL Connect Fill List. You can right-click on the list to 'Save as Excel Spreadsheet' to open, sort and print from there if you choose.

12. If an item on the 'Not Found List' is checked in, will it be removed from the list or do you need to do that manually?

It will be removed from the list. Staff don't need to do anything further with the item. If they check it in and it could fill a hold, it may prompt staff to fill a hold or put it in transit for a hold.

13. How do you access the Router List in CARL-X?

After login, you want to go to the top menu and select Circulation, Router. From there, staff can choose if they want to see the Title, Issue, or Item Router List. Unlike CARL Connect, CARL-X has these lists separately, not in one cohesive list. The list should default to the branch you are logged in as but if it doesn't, staff can choose their branch from the drop-down. Then click GO. Click on Print to print the list. Make sure to select Landscape for print orientation.



14. Is TLC still working on the issue where the fill list doesn't take libraries closed dates into account in order to give those closed libraries time to pick holds for their patrons?

Yes, TLC knows about this and how, in some ways, a very dynamic fill list isn't always the most efficient. OWLS has talked to them numerous times and they are working to alter this. Ideally, our system would like to see items show up on lists to give libraries a chance to fill their patron's

holds with their items. And when a library is closed, and the system sees another library who is open with the item, it will put the hold on the open library's list instead. Even if it would take a few extra days to get there.

15. Is there a report that can be sent out monthly for New Patrons like there was in Sierra?

There is a New Patron Report but this doesn't give any patron information, just total numbers for patron types. Staff can use Report 1 – Patron List to pull this data. When in the parameters, they would just need to select the Registration Date as the Date Type and Registration Branch as the Branch Type. This is a report that does not open just by clicking on View. Staff will need to open this file through the C drive. Molly will send out separate instructions for this report.

16. Is there a report that lists items that patrons are getting from other libraries vs. the items that patrons are getting from their home libraries?

OWLS can look into this but currently doesn't think this is something we have. The statistics page has the number of ILL items loaned and borrowed.

17. Were multi-volumes dealt with?

18. Why is it that when I trapped an item to fill a hold in transit, the status in CARL-X says Hold in Transit but in Discovery, the status says "SC – Library Use Only?"

When a Fill List item is marked as "Found" in Connect Staff, the status in the record will show as "SC – Library Use Only" because that was the language chosen for mapping purposes before migration. The item status will then change to Hold Pending and the item will maintain this status until it is checked in through the returns function and changed to "In Transit" AND the next delta runs to update the item status.

19. Why are there duplicate items on my Fill/Router List even after I've filled a hold?

This happens when there are 2 records for the same GUID in FILLIST and returning the item (checking it in) only removes ONE of these records. Also, what can happen is 2 items from the same BID on the Fill List are not correctly deleted all of the time, which would then appear as a duplicate on the router list. These are both to be fixed in the summer release, coming out June 30<sup>th</sup>. OWLS will need to test this before it can go live.