CARL Conversations: May 13, 2021

Topic: Holds Management in CARL-X and Connect

Question and Answer Session

1. **What is the ASAP option and why/when would you use it?**

   ASAP is an option in the Holds function located at the bottom of the window in which staff can choose to have their hold placed at the top of the queue. If this box is checked, then no matter what holds are on the item (title, item, issue) it will place the patron first and will fill that hold before any other holds. OWLS is asking that staff only use this for cataloging purposes when needing to bring back a damaged item that can no longer circ or when a patron's hold that was already at the top of the queue needs to be replaced (such as with a damaged item, an accidentally cancelled hold or when an item needs to go to another library). Please do not use this for personal use or for programming purposes.

2. **Does the ASAP function only work for your materials?**

   No, not necessarily. This isn't something we can really control. If it was an item hold because it was damaged or needs updating, then yes, it may be a more specific copy that belongs to your library you're requesting. And you would select "Item" as the Hold Type when placing this ASAP hold. But in terms of title holds that were accidentally cancelled when the patron was next in line, then it is appropriate to use ASAP to replace the hold and put the patron at the top of the queue. The next available copy would the fill that hold.

3. **What is the Insert option and why/when would you use it?**

   Insert is an option in the Holds function located at the bottom of the window in which staff can choose to place a patron back in the appropriate place in the holds queue after their hold had been cancelled. At times, holds may get cancelled accidentally and this is an easier way to place that patron back in the queue by selecting the initial date the hold was placed. It will look at that date and place them appropriately in line. This doesn't allow staff to see holds that have been cancelled.

4. **Why can't we just click on "Item Queue" or "Issue Queue" and just see a list of all the Item or Issue holds? Why do we need to click on individual items?**

   This is how CARL is set up. By highlighting and item and clicking "Item Queue," the system sees no holds and doesn't think it needs to show you item holds against any other items.

   When an item is highlighted and "Issue Queue" is highlighted, CARL will show you all holds attached to items with the same chronology and enumeration. For example, if you click on an item that is volume 6 of a book, it will show you all the holds placed against v.6.

   OWLS has submitted an enhancement request with TLC to see if an easier hold view could be developed.

5. **Is there or will there be a way to see a patron's cancelled holds?**

   There currently isn't a way to see cancelled holds for a patron or item by staff. This would need to be done by OWLS staff. Please email OWLSnetHelp if this happens. OWLS is encouraging TLC to include a way to see cancelled holds in future releases.

6. **If a patron changes their hold pickup location after an item is already on the hold shelf for them, would this put the item on the "clear hold shelf" list or would it switch it to the new location once it's scanned again?**

   OWLS doesn't think it will change to the new location but will look more into this. It seems that when this happens, staff are cancelling the hold and then replacing it with the new pickup location and putting them first in queue. This would be an appropriate time to use the ASAP feature, scan the item back in through Returns and send it on to fill the hold.

7. **What functions are best used in Connect?**

   It seems that libraries prefer using Connect for tasks such as: resetting PINs, setting up new patron accounts, updating patron accounts, adding items, placing individual holds, and fines. Most libraries are still using CARL-X for checking in and checking out materials.

8. **Does any of this, searching/placing holds, change at all with BiblioCommons?**

   Placing holds when starting in CARL Connect will not change.

9. **How do staff place multiple holds?**

   CARL-X needs to be used when placing multiple holds. In the Holds function, there is a box staff can check for "Retain Title" or "Retain Patron." If needing to place multiple holds on the same title, maybe for book club, check the "Retain Title" box and continue to place title holds. The system will prompt you after the first hold that there is already a hold on the title if another hold is placed for the same patron. If you have the option to Override, please do so. If you don't, please notify OWLSnetHelp and we will check permissions.

10. **When using Connect and staff go into a patron account through Connect, will they see BiblioCommons or CARL?**

    Staff will see CARL if they are going through CARL Connect Staff. BiblioCommons will just be the patron facing side of it.

11. **When is the next CARL update? And will you notify us by email of the new features?**

    May 18th is the next scheduled update. OWLS should know by today if that is still on schedule. There was a small bug found that needs fixing. OWLS and TLC are hoping it can be taken care of before the update. The main feature of this update is the Damaged Item Workflow. The next release is expected for June 30th. OWLS will need to do some testing and hope to have the release in Production by August. The June release will have more of the CARL Connect Circulation functionality. And yes, OWLS will send out an email notifying everyone of the features and when these will take place, since staff will need to download new software. But OWLS will walk staff through this as needed.