

CARL Conversations: July 22, 2021

Topic: Loan Rules

Question and Answer Session

1. How are loan rules configured?

In CARL, OWLS set up the loan rules to attached to the media codes. This was the closest we could get to matching that to I-types in Sierra. There are generic system level rules attached to each media code. If these don't work for libraries, then an exception rule is entered into the database that would override the system rule. OWLS staff have the option to set rules for loan periods, holds and fines.

2. Why is it that some items that can only circ at their home branch can't be checked in elsewhere? Even other consolidated branches?

Certain media codes, like PASS, have been set up in the database to return at the item's home branch. OWLS doesn't use this option often. But in some cases, it does require items to be returned at the owning branch.

3. Why is it that some items we get a Big Red Box for in CARL-X when checking in but not in Connect? Even though Connect says it was checked in, but the item remains on the patron's account?

This has to do with the functionality gap between the two platforms. TLC is actively working to narrow this gap, but in the meantime, OWLS recommends staff use CARL-X for check-in/out.

4. If a library has an exception added (for loan, holds, or fines) then that rule applies to the item no matter where it is checked out?

Yes, unfortunately. This is something OWLS became aware of recently and TLC is working on solutions for us. If staff use media codes WITHOUT asking for an exception to it, then the items circulate based on the transacting branches' rules. If staff ask for an exception rule, THEN the item now circulates based on the item's owning branch, no matter where the item is checked out. We're hoping TLC can come up with a solution sooner than later. OWLS will update everyone once something has been put in place.

5. Will staff know if there are exception rules on items when it comes to fines or loan periods?

Not always. It depends on how drastic of a difference the rule is from the 'norm' that staff would be accustomed to. Due dates, yes, staff would most likely notice that first. When it comes to fines, again, depending on how different they are, staff won't notice this until items are returned or patrons bring it up. A lot of library fines are similar with major differences being in DVD's or equipment items.

6. Is there a new teacher card procedure for CARL?

That is currently being approved for posting. Once it has been approved, it will be posted and sent out with the Q&A.

7. Where can we see the media codes and their system level rules? Also are the exception rules posted somewhere?

Staff can access the list of current media codes from the Circulation page of the website. This includes the code, name, loan period, renewals, etc. The exceptions aren't posted because this would be a constant changing document and quite a large document. Molly will investigate what it would take to create a document for all exceptions for libraries reference.