

## CARL Conversations: June 24, 2021

### Topic: On-The-Fly Records in CARL-X and Connect

#### Question and Answer Session

1. Which platform should we be using when it comes to creating the on-the-fly records?

Both CARL-X and Connect have the capability to do this. Slightly different in steps but can be done. CARL-X creates a temporary record while Connect adds your on-the-fly item to an already existing BIB record. With the functionality gap between CARL-X and Connect, staff won't see that an item is On-the-Fly when they check it back in in Connect. But in CARL-X, there will be a red box that comes up indicating the item is a temp bib. OWLS does recommend staff use CARL-X for check-in and out functions for the purpose of seeing those pop-up messages that don't appear in Connect.

2. Why are we creating "on-the-fly" records at all?

At times, items make it back into the library that had been removed from the database. These items either have a barcode on them or it had been removed. Either way, when these items are brought to the circulation desk for checkout, staff are informed by the system that the item is no longer in the database. In order to check the item out to the patron, staff need to get some sort of information in the system so it knows how to calculate loan periods and connect the item to the patron.

3. What are the two ways to create an on-the-fly record in Connect?

Staff can either create an on-the-fly item through the item search function in Connect or the bib search function. If using the item search, staff will need to type in "161050" to pull up the on-the-fly record. If staff are using the bib search, then type "on the fly" into the search field when the InfoSoup page opens. Select the first item record. Staff can then click on "add item" to enter in all the information.

4. Do we need to put a price in and if so, what should we put if we don't know the price?

It is not required in either Connect or X, but it is recommended by OWLS to do so. If unsure of a price, check the item near the item barcode (not the library barcode) and see if one is listed. Feel free to use that. If there isn't one, and you're comfortable taking a guess, go ahead. This can always be changed later on. Also, if you use default prices you can enter that in, too.

5. Do staff need to use an on-the-fly record, or can they just create a real record for the item?

Of course. Whatever works best for staff workflow is what should be done. Using the on-the-fly workflow can help with time if staff don't have the time to create a real record for the item. But if staff have the time and patrons don't mind, then by all means, go for it.

6. Is there any indication in Connect that an item is on-the-fly when it is returned? The charge/discharge note is added but it doesn't show up?

As mentioned before, there is some functionality gaps between CARL-X and Connect when it comes to pop-ups. The on-the-fly charge/discharge note should still be added when using the Connect workflow. This will ensure that when the item is checked in using X, that staff will be notified with a big red box. However, Connect does not notify staff when an item is on-the-fly. Please be aware of this if using Connect for checking in materials.

7. When will we need to move to using Connect fully?

There is no set time on this, but TLC is working on the functionality gaps between the two platforms. As soon as we know that those have been minimized, we will send out an update so that no one is left using a platform they don't want to.

8. Is there a way to indicate on the hold alias those patrons who want to be called when holds arrive?

There is not a way to do this with the hold alias, but staff can add the letter "P" after the phone number and then OWLS can add the patron phone number to the hold slip template. But if your holds are self-serve then you probably don't want their phone number listed on the slip.

9. When creating the on-the-fly record in CARL-X, is that creating a temp bib rather than adding the item to the existing on-the-fly bib record?

Yes. Using CARL-X will create a temporary bib record for your item and isn't attaching to any existing records. In Connect, staff are attaching their item to the already existing record. Anyone using Connect for this will have their on-the-fly items on the same record.

10. Is there a report that can be run to see how many on-the-fly items are out there?

There currently isn't a report being run to locate these. This wasn't something OWLS did in Sierra but if libraries are interested and would like to see their on-the-fly items or the items with a temporary bib record, we can certainly look into it.

11. Did any items migrate over to CARL and get switched to on-the-fly? It's confusing to staff when they see the "Not Converted" message when scanning items not in the system.

If an item was attached to the on-the-fly record in Sierra, then it should have migrated over to CARL as such. Nothing should have been switched to "on-the-fly" in CARL at time of migration; OWLS didn't map anything to on-the-fly except for those items that were already labeled as such in Sierra. In CARL-X when staff get the "Not Converted" box, this is just TLC's way of saying "Not Created." It doesn't necessarily mean the item didn't migrate over. It just means that the database is not recognizing the item. Any item that was deleted from Sierra prior to migration, and then returned after migration will trigger the "Not Converted" message.