

Adding and Removing Notes to Items in CARL-X

Staff can add a note to an item to indicate damage, how many pieces/parts, short loan stickers, etc. The below instructions will show how to add a note as well as removing the note.

Adding Notes in CARL-X

1. Double click on any item barcode to pull up the Item Detail window

Item Detail (32258000018875)

Title: Her quiet revolution : a novel of Martha Hughes Cannon : frontier doctor and first female state ser

Author: Monson, Marianne, 1975- Item ID: 32258000018875

Call No: Monson Price: \$0.00

Branch: OWLS Location: AFIC Media: ABK

Statistics Status Holds/Recalls Transaction History

Circ History: 0 Holds History: 0 Cumulative History: 1 In-House History: 0

Year	Branch	Transaction	Count
2021	OWLS	Charge	1

Who Has It? Who Had It? Who Owes? Who Wants?

Spine Hold **Notes** Edit Close

2. Click on the Notes button to bring up the Note Editor window.
3. From the Note Type dropdown, select “001 – Charge/Discharge Note.” Choosing this will ensure the note pops up each time staff scan the item. *If you don’t need the note to pop up when the item is scanned then a “Standard Note” will do as well.
4. From the Note Contents, choose either **Predefined** or **Free Text**, depending on what type of note you want to add. *Choose **Predefined** for Short Loan items.

Note Editor

Note Type: 001 - Charge/Discharge Note

Note Contents: Predefined Free Text

Predefined options: Damaged - In transit for patron, Damaged - In transit for review, On the fly

Type	Note Content	Alias
Charge/Discharge	Please add Short Loan sticker to item and remove this message	2022 11:28:10 / mk0

Delete Save Close

5. If using Free Text notes, add in your note making sure to be as concise as possible and including your initials, library code and date. ie “[note] MK/OWLS 11/22/22”
6. Click on Save when you are finished. Then click on Close.

Removing Notes in CARL-X

1. Double click on any item barcode to pull up the Item Detail window
2. Click on the Notes button to bring up the Note Editor window.
3. Highlight the note you no longer need.

Note Editor ×

Note Type
001 - Charge/Discharge Note

Note Contents
 Predefined Please remove Short Loan sticker from item and remove this message
 Free Text

Type	Note	Date
Charge/Discharge	Please remove Short Loan sticker from item and remove this message	11/22/2022 11:32:00 AM

4. Click on "Delete."
5. Click on "Save" and "Close."