



CARL•X ILS Acquisitions Training OWLSnet

Software Trainer
Cindy Phillips

Supporting TLC Staff
Jessica Seybold

Date & Time
July 1 and 2, 2020
9 am to 12:30 am Central Time each session

Agenda Day One

9:00 am	-	9:05 am	Introductions
9:05 am	-	9:20 am	CARL•X Staff Client Overview
9:20 am	-	9:50 am	Fund Creation & Maintenance Documentation: CARL•X Financials - Fund Maintenance
9:50 am	-	10:20 am	Vendor Creation & Maintenance Documentation: CARL•X Financials - Vendor Maintenance
10:20 am	-	10:45 am	Acquisitions Workstation Settings & Defaults
10:45 am	-	11:00 am	BREAK
11:00 am	-	11:30 am	Distribution & Receive Profiles
11:30 am	-	12:00 am	Searching in CARL•X Acquisitions
12:00 am	-	12:30 am	Q & A and Wrap up

Agenda Day Two

9:00 am	-	9:45 am	Order Creation & Maintenance Documentation: CARL•X Acquisitions - Order
9:45 am	-	10:00 am	Batch Loading Orders
10:00 am	-	10:30 am	Receiving in CARL•X Documentation: CARL•X Acquisitions - Receiving
10:30 am	-	10:45 am	BREAK
10:45 am	-	11:15 am	Invoice Maintenance Documentation: CARL•X Financials - Invoice Maintenance
11:15 am	-	11:30 am	Acquisitions Reports & Utilities Documentation: CARL•X Reports & Utilities Quick Reference Guide for Acquisitions and Serials Reports and Utilities