

## Converting On-The-Fly Items

Both CARL-X and Connect have the capability of converting on-the-fly items. When staff try to check out an item for a patron and get the “Not Converted” message, they need to follow the below steps in order to create a temporary record. Once the item is returned, staff can then enter the item into the database with a permanent record.

### Connect

During checkout, items that receive the “Non-overridable Error” message box are no longer in the database. Click on Cancel and follow these instructions to create a temp record:

- Open a browser and log into a CARL Connect session and into the “Items” function.
- To pull up the “on the fly” record, do one of two steps:
  - In “item lookup” type in “161050” into the second search box, OR
  - Under “bib search” type in “on the fly” which will bring up item results. The first record is the one you want. Click the green box “Select Back.”
- In the item view, select “add an item” near the top left of page.
  - Scan in your item barcode and make any other necessary edits to the record:
    - Include a note in which the note type is “charge/discharge” and then a predefined note of “on-the-fly” This will alert staff in CARL-X the next time the item comes to the desk that it should be added into the system.
- Once all information has been added, click Save. You can now go to the checkout screen and check the item out.

When the item comes back in, it will indicate it is an Item-on-fly. Note this and let cataloging know so they can process it. (Currently, Connect does not notify staff when an item is on-the-fly; only CARL-X does)

## **CARL X**

During checkout, items that receive the “Charge Exception: Item Not Converted” big red box are no longer in the database. This box will allow for you to create a temporary On the Fly record for the patron. Follow these steps:

- Fill in the Item ID (if one did not populate in) and any other necessary edits (published date is not required).
- Once all the information has been verified, click on “Create Temporary.”
- You can then check the item out to the patron.
- Make sure the due date is correct. It should auto populate depending on the location/media code you entered in. If it is not correct, then check it back out to the patron but make sure to override the due date prior to checking out.

When the item comes back and is scanned in returns, there will be an “Exception Temp Bib Record” big red box that comes up. Click OK to finish checking it in. And then send to cataloging/tech services of your library to have them officially add the item in.