

Horizon 7.5.4

Circulation User Guide

September 2016



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Circulation User Guide

Welcome to Horizon Circulation. Circulation is made up of related computer tools or “processes” that help you manage the circulation of library material. Working in concert with other processes such as staff searching and Cataloging, you can use Circulation to create and edit borrower records, check items in and out, process borrower requests and holds, generate notices to inform borrowers of circulation matters, and compile and print circulation statistics.

The Horizon Circulation User’s Guide is for all Circulation supervisors and staff. It explains how to use Circulation to manage all your library’s circulation-related tasks, such as fast-added records, blocks, requests, and notices. It also explains Circulation reports.



Most setup and administration-related topics that are specific to Circulation are covered in the [Circulation Setup Guide](#).

For more information about this guide, see these topics:

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Circulation User Guide Contents

This guide contains these major sections:

- **Getting started** on page 1 explains the basic information you need to begin using Circulation, and gives you an overview of this guide.
- **Checkout and Checkin** on page 17 explains basic checkout and checkin procedures and includes information on renewing checked out items, changing the checkin date of an item, printing circulation receipts and workslips, and other related tasks.



- **Hold requests on page 41** explains how to place and fill requests, manage holds, and perform other related tasks.
- **Blocks on page 65** explains blocks, and how to place, view, and resolve them. It also explains how to handle fees, bills, and payments.
- **Notices on page 99** explains the types of circulation notices and how to use, generate, and print them.
- **Borrower and item records on page 125** explains how to add, edit, and delete borrower records and perform related tasks, including setting up proxy borrowers and replacing borrower barcodes.
- **Reports on page 169** explains the different circulation reports that you can access or create.
- **Using the Item Group Editor on page 185** explains how to change information for multiple item records by using the Horizon Item Group Editor.
- **Index** to the guide.

Conventions used in this guide

This guide uses terms, typefaces, and symbols to denote different kinds of information. Understanding these conventions can help you recognize the information you need more quickly.

Symbols

This guide uses these symbols:

Symbol	Description
	Tip This symbol indicates additional notes or helpful tips.
	Important This symbol indicates important information or warnings.

Mouse conventions

The following terms are used in this guide to describe actions you do with a mouse.

Term	Definition
Click	To place the mouse pointer on an icon, command, or button and quickly press and release the primary (usually the left) button once.

Term	Definition
Double-click	To place the mouse pointer on an icon, command, or button and quickly press and release the primary mouse button twice.
Right-click	To place the mouse pointer on an icon, command, or button and quickly press and release the secondary (usually the right) button once.
Drag	To press and hold the primary mouse button while moving the mouse.
Choose	To click a button or an option from a menu, group of options, or list.
Select	To click once on an option in a list so that the option is highlighted. In a field, you may drag the mouse over text to select that text.

Keyboard conventions

This guide refers to keys following the standard convention of 101-key keyboards. For example, Ctrl is the control key, Alt is the alternate key, Enter is enter or return.

When you need to press two or more keys at the same time to do an action, the keys are connected with a plus sign (+). For example, **Alt+H** means to press and hold the **Alt** key while you also press **H**.

Keys you press appear in bold type in steps. Text or numbers that you need to enter using the keyboard also appear in bold (for example, “Type **main** in the **Location** field”).

Other conventions

In step-by-step instructions, the names of menus, buttons, fields, and other options appear in bold type (for example, “the **OK** button” or “the **Title** field”). This helps you quickly identify which elements you should look for on the page or screen you are navigating.

When you are instructed to choose an option from a menu, the menu and menu options are separated by the greater-than symbol (>). For example, “choose **File > Save**” means to choose the File menu, then choose the Save option from the menu. This convention is also used to show the sequence of items you use on the navigation bar to open a form or page.

Text in italics shows general information that you must replace with information that is specific to your system. For example, you would replace *password* with a specific password, such as **123gr@ndma**.

File and directory names, code examples, and computer output appear in *Courier*.

Possible differences between the software and this guide

The names, labels, and sample windows in this guide reflect the default settings that are delivered with most new installations. The settings on your system may be different from these defaults, depending on your library's implementation choices and the way your system administrator sets up your system. For example, your system administrator can change labels and set up security to limit access to certain features.

Additionally, as you use the software, you can resize windows or customize your workspace. Consequently, your software environment may look and function differently than the environment described in the tasks in this guide.

This document is compatible with Horizon 7.5.4. Information in this document may also be compatible with later versions.

Documentation updates

Updates to this guide are posted to the customer support website between releases, as necessary. These updates provide corrections to unclear, incorrect, or incomplete information. They also provide documentation for enhancements that were not complete at the time the guide was first published.

You may access the customer support website at <http://support.sirsidynix.com>.



The customer support website requires a username and password. If you do not already have a username and password, contact your system administrator to receive one. If you are the system administrator for your library and need a username and password for the support website, please contact SirsiDynix Customer Support to receive one.

Documentation updates can include, but are not limited to, the following formats:

- PDF (Portable Document Format)
- HTML Webhelp
- EPUB
- Microsoft Word

To view a PDF file, you must install Adobe's Acrobat Reader on your workstation. You can download Acrobat Reader free of charge at Adobe's web site, <http://www.adobe.com>. Several open source eReaders are also available online which can open other formats such as EPUBs. Please contact SirsiDynix Customer Support if you are having trouble finding this guide in the format that you need.

Comments and suggestions

SirsiDynix welcomes and appreciates your comments on its documentation. We want to know what you think about our manuals and how we can make them better. If you have comments about this guide, please send them to docs@sirsidynix.com.

Be sure to include the title and version number of the guide and tell us how you used it. Then tell us your feelings about its strengths and weaknesses and any recommendations for improvements.

Chapter 1: Getting started

This chapter provides you with the basic information you need to begin using Horizon Circulation. It gives you an overview of this guide, a review of some basic Horizon tasks and the Launcher interface, and an overview of Circulation.

This chapter contains these topics:

Horizon Basics	1
Starting a Horizon Process	3
Customizing the Launcher	4
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Circulation Security	7
Circulation and Supporting Processes	7
Day End Processing	8
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Horizon Basics

This guide assumes that you have a basic knowledge of your Windows operating system, Horizon, and working in Horizon windows. At the minimum, you should know how to:

- Use a mouse or keyboard to do basic tasks, such as choosing menu options and buttons.
- Work with windows (selecting, moving, minimizing, restoring, maximizing, sizing, scrolling, closing, and so on).
- Work with dialog boxes.
- Log in to Horizon, change operators, and log off Horizon.
- Search for records on the Horizon system.
- Work in Horizon list and edit windows.



If you do not know how to do these tasks, see the [Windows online help](#), your [Microsoft Windows manual](#), or the *Horizon Basics Guide*.

Additionally, you need to understand how to use the Launcher environment. The Launcher is the framework that you use to open and navigate through the various Horizon processes. You can also use it as a tool to access some of your other desktop functions.

The Launcher workspace starts automatically when you first log in to Horizon. It includes pop-up lists, toolbars, and a navigation bar that help you do tasks easily. You or your system administrator can customize toolbars, the navigation bar, and some other features of the Launcher environment.

Here is an example of a Launcher workspace:

Figure 1-1: Launcher workspace

The screenshot shows the Horizon Launcher interface with several callouts:

- Navigation Bar:** "The navigation bar displays folders that group related Horizon processes together." (points to the left sidebar)
- Toolbar:** "You can click buttons on a toolbar to start processes and do tasks in Horizon." (points to the top toolbar)
- Menu Bar:** "You can choose options from the menu bar to start processes or do tasks. The available menu options vary, depending on where you are in Horizon." (points to the top menu bar)
- Process List:** "If your navigation bar is set up to show shortcuts, they display in this column." (points to the process list in the center)
- Active Window:** "The active window's title bar displays in a different color from other open windows." (points to the top bar of the active window)
- Pop-up List:** "Horizon displays process, record, and other windows in the main Launcher workspace." (points to a pop-up menu)
- Workbook View:** "If you use the Workbook view, each open window or process has a tab. You can click a tab to activate the window or start the process." (points to the bottom tabs)
- Right-click Context Menu:** "You can activate a pop-up list by right-clicking the mouse in the Launcher workspace, or in an open window or record. Pop-up lists give you options that vary depending on where you are in Horizon." (points to a context menu over a process)

For more information on working in the Launcher environment, see the *Horizon Basics Guide*.

This section explains these topics:

- [Starting a Horizon Process on page 3](#)
- [Customizing the Launcher on page 4](#)

Starting a Horizon Process

When you do a task in Horizon, you must first start the process that lets you do the task. If you have already started several processes, you can activate the open process window that you want to use. The active window's title bar displays in a different color from other open windows. If the windows are displayed in a cascade, the active window moves to the front.



If you cannot activate a different window, the currently active window needs attention before you can continue. You must either close the window, or cancel or finish its process. (For example, if the window is a search window, you must complete the search, cancel the search, or close the window before you can start a different process.)

Horizon lets you use several different methods to start most processes. The various tasks in this guide usually give only one or two of the methods. As you work with Horizon, you will discover which methods are most convenient for you.

For example, if you work best using a mouse, you may choose to use the menu bar to start processes. If you prefer using a keyboard, you may choose to use keyboard shortcuts.



Your security settings and Launcher configuration may affect the options that you can use to start some processes. (For more information, see your system administrator.)

This section explains some of the methods you can use to start a process in Horizon. (For examples of some of these methods, see [Figure 1-1 on page 2](#).)

This section explains these topics:

- [Starting a Horizon Process Using a Mouse on page 3](#)
- [Starting a Horizon Process Using a Keyboard on page 4](#)

Starting a Horizon Process Using a Mouse

When you use the mouse to start a process, you click or double-click on a specific part of the Launcher workspace. Here are some of the ways you can use a mouse to start a process:

- **Double-click on a process or tool on the navigation bar.** The navigation bar stores processes and tools in folders. (For more information, see “Horizon User Interface” chapter of the *Horizon Basics Guide*.)
- **Click on a toolbar button.** You can use the toolbar to start a process only if you (or your system administrator) have added a button for that process. (For more information, see the “Customizing the Toolbar” chapter of the *Launcher Configuration Guide*.)
- **Click on an option from the menu bar.** Choose **Window** and the open window or record that you want to make active.
- **Click on the window that you want.** If you can see part of the window or record that you want to make active, click on the window.

- **Use the Workbook view.** Click on the tab of the open window or record that you want to make active. (For instructions on opening the Workbook, see the “Horizon User Interface” chapter of the *Horizon Basics Guide*.)

Starting a Horizon Process Using a Keyboard

When you use the keyboard to start a process, you press a certain sequence of keys. You must know the keystrokes that open the function that you want. If your navigation bar is open and is set up to display shortcuts, you can see the keystrokes listed there. (However, the navigation bar does not have to be open for you to use the shortcuts.) The drop-down menus on the menu bar also display several keyboard shortcuts.

Your security settings may give you the rights to edit or create a shortcut. (For more information, see the *Launcher Configuration Guide*.)

You can use the keyboard in these ways:

- **Lead-in keys.** A lead-in key focuses the cursor on a certain set of tasks from which you can choose. The **F9** key focuses the cursor on the navigation bar, so that your next keystroke moves you through the folders of the navigation bar to find the process that you want to start. (You can use arrow keys, the first letter of the process that you want, or choose Find from the Edit menu to move to the process.)
- **Predefined keyboard shortcuts.** Windows and Horizon have certain default shortcuts that can help you in your work. You cannot change these shortcuts. (For example, **F2** starts a New Search.) (For a list of the most common predefined keyboard shortcuts, see “Shortcut Keys” in the “Horizon User Interface” chapter of the *Horizon Basics Guide*.)
- **User-defined keyboard shortcuts.** You can create shortcuts that start Horizon processes when you customize the Launcher. (For more information, see the *Launcher Configuration Guide*.) You can also edit or create shortcuts for many of the functions in the MARC Editor. (For instructions, see [See "Customizing the MARC Editor"](#).)
- **Press ALT+W.** This activates the Window drop-down menu. Then type the number of the open window or record that you want to make active.



Pressing **ALT** plus any underlined letter in the menu bar activates the drop-down menu for that menu option.

- **Press CTRL+F6.** This cycles through the open windows.

Customizing the Launcher

Depending on your security settings, you can customize your Launcher. (For instructions, see the *Launcher Configuration Guide*.) In general, you or your system administrator can customize the Launcher in a variety of ways.



Unless your security settings let you save changes that you make in the Launcher environment, the Launcher may revert to its default appearance when you log off.

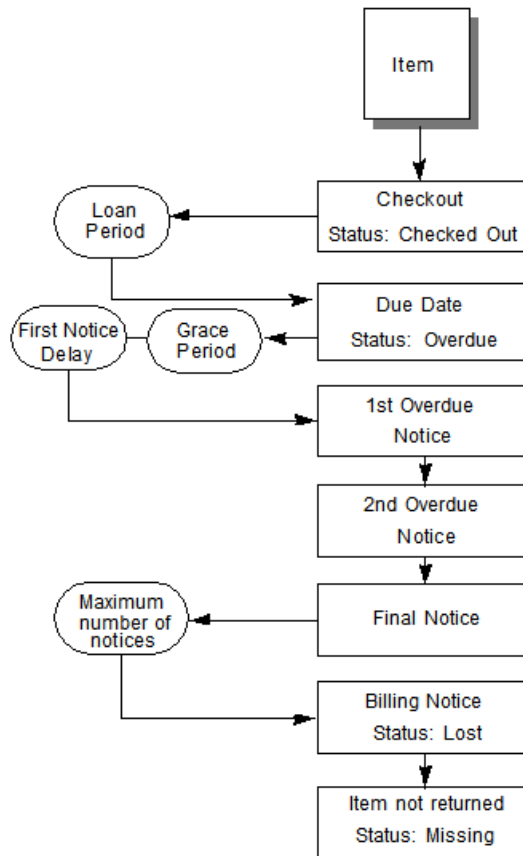
- **Toolbars.** You can create a new toolbar or modify an existing toolbar's appearance and design so that the toolbar shows only the processes you use frequently.
- **Navigation bar.** You can hide or add new folders, processes, and applications to the navigation bar, including third party products. You can also set up shortcuts for processes and applications on the navigation bar.
- **Diacritics.** You can add, delete, and edit the non-keyboard characters (such as the British pound or an accent mark) that are available on the Diacritic Shortcut Bar. You can also specify the shortcuts for each character.
- **Background.** You can choose what background displays in the Launcher workspace.
- **Startup.** You can choose the processes that start automatically, and which folders on the navigation bar open automatically, when you first log in to Horizon.

Circulation Basics

Each Horizon Circulation process helps you with different aspects of your circulation workflow. (For example, you maintain borrower records and check out books in the Open CKO Window process; you create and print reports in Circulation Reports.) The tasks you do in Circulation help you manage how borrowers use your library.

This workflow example follows an item from checkout until the item is listed as missing. Of course, not all checked out items will follow this sequence. A borrower may wish to renew an item, for example, which would cause Circulation to generate a new due date.

Figure 1-1: Item workflow



Your system administrator creates information circulation types (ITYPEs) and borrower circulation types (BTYPEs) to manage Circulation. ITYPEs and BTYPEs interact with circulation parameters and other settings to determine loan periods, due dates, overdue dates and fines, and other necessary circulation functions.

This section explains these topics:

- [Circulation Security](#) on page 7
- [Circulation and Supporting Processes](#) on page 7
- [Day End Processing](#) on page 8
- [Starting Checkout and Checkin](#) on page 8
- [Overview of Tasks](#) on page 10
- [Basic Circulation Tasks](#) on page 11
- [Understanding Item Circulation Types](#) on page 15
- [Understanding Borrower Circulation Types](#) on page 15
- [Changing the Sounds for Circulation Events](#) on page 15

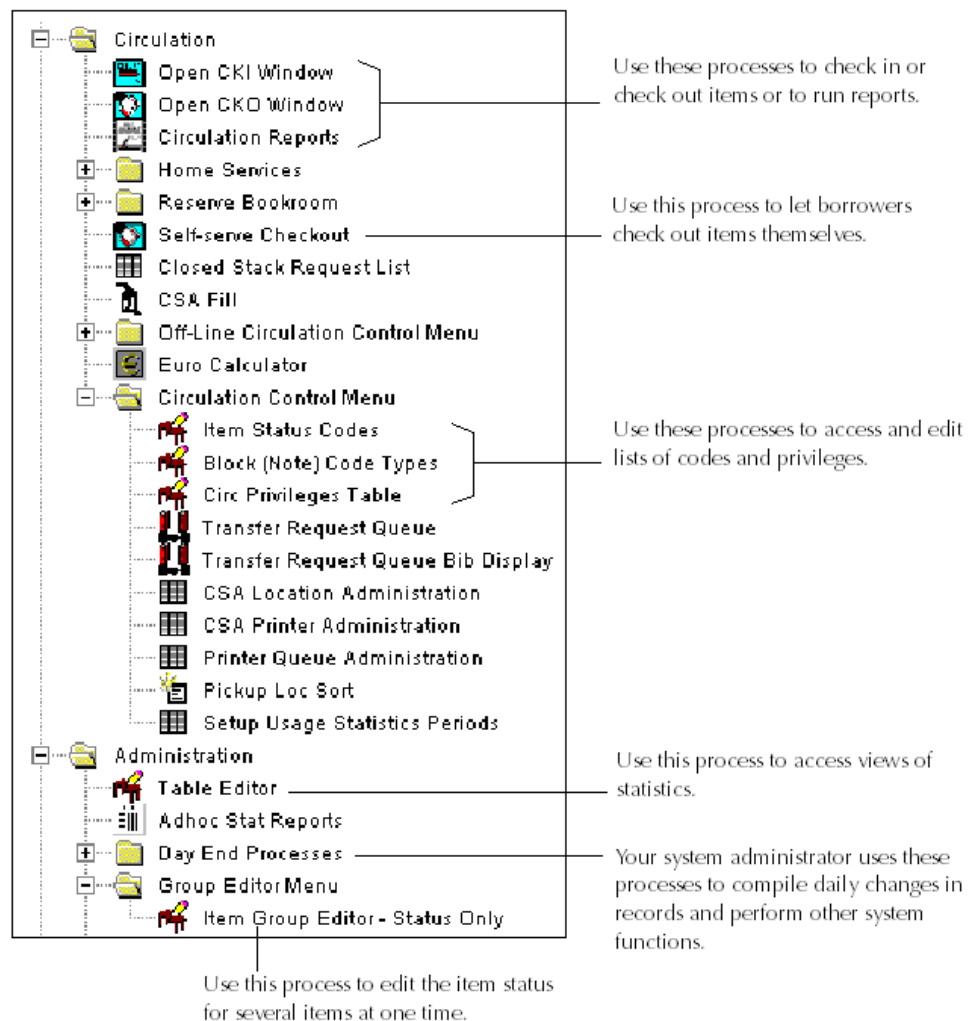
Circulation Security

Horizon applies security options for each function in Circulation. Your system administrator determines which functions are available to the various staff members based on their user privileges. (For more information, see the “Securing Horizon” section of the “Security and Preferences” chapter of the *System Administration Guide*.)

Circulation and Supporting Processes

When you first install Horizon, the navigation bar contains these Circulation and supporting folders and processes.

Figure 1-1: Circulation and supporting processes



You may see processes other than these on your navigation bar. Your security setup and Launcher configuration determine what processes are available on your navigation bar and where they display. (For more information, see your system administrator or the *Launcher Configuration Guide*.)

Day End Processing

Day End processing is a set of procedures usually run once a day by your system administrator. These procedures update certain Horizon functions, including such Circulation functions as calculating which items are overdue, generating notices to be printed, and running statistics. This section briefly describes Day End Processes that are pertinent to Circulation. (For more information, see the “Maintenance and Day End” chapter in the *System Administration Guide*.)

These are the Day End Circulation processes:

- **Set Overdues.** This changes the status of an item from checked out to overdue. The status is changed when an item has been out past its due date.
- **Expire Holds.** This cancels holds. Holds are cancelled when they reach their expiration date. The item’s status is changed from Being Held to Checked In. A Hold Expired Block is placed on the borrower’s record, and a notice is generated to send to the borrower.
- **Purge Circ History.** This deletes information about prior circulation activities. The number of days that must elapse before information qualifies to be purged is specified in the `item_type` view.
- **Purge Requests.** This deletes any items from the request queue with a request expiration date that has been reached without the request being filled. A Request Expired block is placed on the borrower’s record, and a notice is generated to send to the borrower.
- **Purge Notes.** This moves resolved blocks to the borrower’s History Blocks file.
- **Generate Notices and Reminders.** This compiles all the notices and reminders to be sent to borrowers. The notices can be printed from Circulation Reports as soon as Day End has finished running.
- **Purge Burb History.** This deletes past notes and blocks after a specified amount of time has elapsed. The number of days that must elapse before a purge or block is purged is specified in the Block Type view.
- **Age Item Status.** This changes an item’s outdated status. (For example, if an item has had a status of Lost for a certain amount of time, the status will be changed to Missing.)
- **Day End Stat Processing.** This gathers statistics on various library activities such as which groups of borrowers checked out which types of items. Day End can also generate reports based on these statistics.
- **Day End Create and Output Notices.** This creates and sends overdue notices to borrowers.

Starting Checkout and Checkin

When you do a task in Circulation, you must first start the process that lets you do the task. This guide assumes that you are beginning each task from within the relevant Circulation process. Most of the tasks you do in Circulation originate in Checkout and Checkin. Your system administrator may have set up your terminal to

automatically display these processes. But in case you need to start these processes, do this task.

To start Checkout and Checkin

- 1 Log in to Horizon.
- 2 Start the **Circulation** process.

The default location of this process is the **Circulation** folder on the navigation bar.

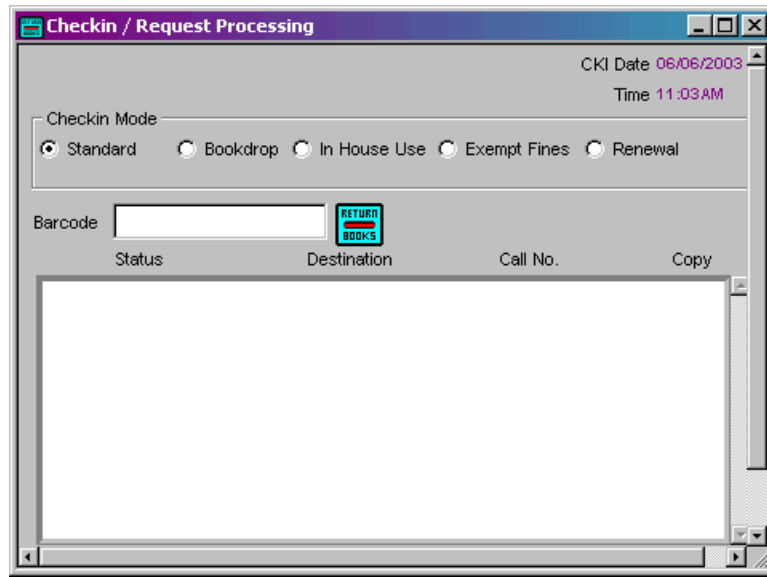
- 3 Double-click **Open CKO Window** to open Checkout.

Horizon opens the Checkout window:

The screenshot shows a window titled "Checkout" with a search field for "Item or Borrower Barcode". Below the search field is a table with columns: "Time/Item Status", "CKO Date", "CKO Loc/type", and "Due Date/n_renewals". The table is currently empty. At the bottom, there is a "Selection" field, "Items Checked Out" showing "0", and buttons for "OK", "Blocks", "Edit Item", "All Items Out", and "Clear".

- 4 Double-click **Open CKI Window** to open Checkin.

Horizon opens the Checkin/Request Processing window:



- 5 Continue with your Checkout or Checkin task.

Overview of Tasks

Circulation helps you keep track of the items in your library. In general, circulation work in Horizon consists of these tasks:

Checkout and Checkin. When you check out an item, Horizon assigns that item to a specific borrower. Other borrowers know when they check the catalog that the item is temporarily unavailable. When you check the item back in, the item is no longer assigned to the borrower, and the catalog shows the item as available again.

Horizon allows you to renew items, check out items to borrowers who have forgotten their cards, “fast-add” new borrowers or uncataloged items to quickly check out items, check in items without calculating fines, change due dates, and check out items that ordinarily do not circulate. Circulation lets you print receipts that can help borrowers keep track of what they have checked out and workslips that can help staff members give special attention to items. It uses defaults set by your system administrator to determine loan periods, fine rates, and so forth.

Working with Special Requests. Horizon lets borrowers electronically request items that are checked out so that when they are returned, the requesting borrower has the first option to check out the item. If your library is set up to do it, you can also request items not housed at your own library. Once a requested item is available, Horizon puts it on hold for the requesting borrower. Reports created by Circulation help you organize borrower requests and holds. The request, notice, and report functions of Circulation work together to accomplish these tasks.

Setting and Resolving Blocks. Circulation can help you control whether certain borrowers can check out items by assigning blocks. Blocks can also be assigned

when you need to interact with a borrower in a manner other than basic circulation. This can happen when borrowers violate library policy, when they have books on hold, or when refunds are due them. Horizon keeps a viewable history of a patron's blocks.

Sending Notices. Circulation can make contact with borrowers through notices, reminders, and invoices in the form of letters, e-mail messages, or phone calls. These contacts inform the borrower of unresolved library business, such as overdue items, fines or fees, items on hold, or expired holds.

Maintaining Borrower Records. Borrower records contain information about all borrowers who are registered to use the library, including borrowers at affiliated or branch libraries. Horizon lets you set up your library so that borrowers whose main account is at a branch library can use library resources in other locations. It lets you keep borrower records current. Your system administrator sets defaults that affect how Horizon uses borrower records. You can also set up proxy borrowers for borrowers who want to let others use their library account.

Generating Reports. Circulation helps you manage your library collection and serve your borrowers. You can use circulation reports as tools to manage borrower requests and holds, evaluate your collection by providing you with circulation statistics, and track cash transactions performed in Circulation.

Basic Circulation Tasks

When you check in or check out an item, make a request for an item for a borrower, or do any number of other circulation tasks, you need to identify the borrower and the item.

This section explains these topics:

- [Identifying a Borrower in Checkout on page 11](#)
- [Identifying an Item in Checkout or Checkin on page 14](#)

Identifying a Borrower in Checkout

When you check out an item, you need to identify the borrower. You do this by retrieving information from the borrower record. There are several ways to find a borrower record in Circulation:

- Scan the barcode label on the borrower's library card.
- Manually enter the barcode number or second ID.
- Search for the borrower record using search criteria.

The easiest way to find a borrower is to scan the borrower's barcode label. There are times, however, when this is not possible. (For example, the barcode label may be too dirty for the scanner to read.) At those times, you can enter the borrower's barcode manually from the keyboard.



If you normally enter barcode numbers manually, rather than with a barcode scanner, your system administrator can program Horizon to recognize a barcode prefix. Normally, the first several barcode digits will be the same for all borrowers at your library. These first numbers are a barcode prefix. If a barcode prefix is set up in Horizon, you only need to enter in the last few numbers (referred to as the significant digits), rather than the whole barcode.

If the borrower's library card is unavailable, you can look up their information. You can search by an alphabetical last name listing or by keywords from the borrower's name. You can also search by borrower alias, borrower record number, or by the barcode of an item that the borrower has checked out. These search criteria are library-defined.



Many libraries set up a second ID in addition to the barcode which can be entered in the Borrower Barcode field to identify a borrower. (For example, some libraries use borrowers' social security numbers for second IDs.) Second IDs are sometimes referred to as borrower aliases. (For more information on second IDs at your library, see your system administrator.)

Searching for a borrower's name is the most common way to search for borrower information. Once you choose the name in the borrower records, Horizon either sends the chosen record to Checkout or first opens a variety of windows, such as the Current Blocks window for that borrower. You can deal with the blocks at that time or send the borrower record to Checkout (if appropriate), so that you can complete the checkout process.

To identify a borrower in Checkout

- 1 Open the Checkout window.
- 2 Do one of these options:
 - Scan the barcode label on the borrower's library card.
 - Type the barcode number in the Borrower Barcode field.
 - Start a borrower search.

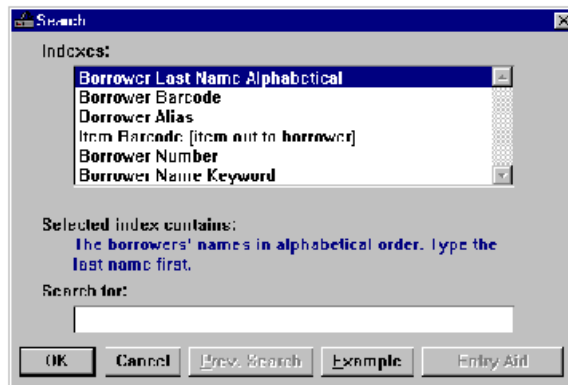
To start a borrower search, follow these steps:

- a If you want to restrict your search to only those borrowers registered at your location, choose **Borrower, Search This Location Only**.

Note: Searches continue to be restricted until you deselect this option.

- b Press **F4** or choose **Borrower, Find Borrower**.

Horizon displays the Search window:



Your system administrator can define the search indexes displayed in the Search window.

- c Highlight the search index you want in the **Indexes** list.
- d Enter the required information in the **Search for** field and click **OK**.

One of these things happens:

- If you choose a search index that requires an exact match, such as the borrower number or the borrower alias, Horizon returns the borrower record results to the Checkout window.
- If you choose an alphabetical search index, or another index that brings up a list, Horizon brings up a complete list of borrowers, sorted according to the search criteria. Double-click on the borrower you are searching for. Horizon returns the borrower record results to the Checkout window.

Note: If the name you enter into an alphabetical search index does not exist in the borrower database, the selector arrow will point at the name that is closest in spelling to the one you entered. You can then cancel the search and add the borrower to the database. (For more information, see “Doing a Basic Search” in the “Searching” chapter of the *Horizon Basics Guide*.)

Horizon displays the selected name, ID #, and borrower type (BTYPE) code and description in the Borrower display field of the Checkout window. With the borrower name entered, you are ready to continue with your Circulation task.

Note: If your system administrator has set it up, Horizon displays additional borrower information, such as the borrower’s address or phone number. (For setup instructions, see “Displaying Additional Borrower Information in Checkout” in the “Changing Circulation Display Options” section of the *Circulation Setup Guide*.)

If at any time you want to clear all of the borrower information from the Checkout window, click **Clear**. Circulation then displays a blank Checkout window.

Identifying an Item in Checkout or Checkin

When you check in or check out an item or make a request for an item for a borrower, you need to identify the item. You do this by retrieving information from the item record. There are several ways to find an item record in Circulation:

- Scan the item's barcode label.
- Manually enter the item's barcode number.
- Search for the item record using search criteria.

If the item to be checked out or checked in has a damaged barcode label, or if the barcode label is not present (such as when a borrower phones in a checkout request), you can search for the item's record in your database. You can then send the information to Circulation and complete the process.

To identify an item in Checkout or Checkin

- 1 Open the Checkout or the Checkin/Request Processing window.
- 2 If you are at the Checkout window, identify the borrower.
Horizon displays the borrower's name in the Checkout window.
- 3 Do one of these options:

- Scan the barcode label on the item.
- Type the item barcode number in the Barcode field.
- Start an item search.

To start an item search, follow these steps:

- a Start a **New Search**.

To do this, press **F2** or find the process in the **Searching** folder on the navigation bar.

- b Search for the item until the title appears in the Bibliographic Detail window. (For instructions, see "Doing a Basic Search" in the "Searching" chapter of the *Horizon Basics Guide*.)

The item's status shows at the top of the window.

Note: If the status of the item is something other than "Checked In" and the item is present, you can still check it out by completing the remaining steps and continuing with the checkout task. (For instructions, see **Checking Out an Item Normally** on page 18.) If the item is not present, you can place a request for the item. (For instructions, see **Placing a Hold Request for a Borrower** on page 42.)

- c Click **Show Copies**.

Horizon displays the title in the Copies window. If there is more than one copy available, highlight the one you want.

- d Press **F10** or choose **Edit, Send to**.

Horizon displays the Send To dialog box.

- e Choose the process to which you want to send the record. (For example, send the record to Checkout.)

Horizon displays the title's barcode number in the barcode field of the Checkout or Checkin/Request Processing window. With the item barcode entered, you are ready to continue with your Circulation task.

Note: If at any time you want to clear all of the borrower and item information from the Checkout or Checkin window, click **Clear**. Circulation then displays a blank Checkout or Checkin/Request Processing window.

Understanding Item Circulation Types

Each item that circulates from your library must be represented by information in your library's database. Horizon retrieves the necessary information during circulation tasks. Your system administrator creates information circulation types (ITYPEs) and ITYPE groups and assigns circulatable items to these groups to manage circulation.

ITYPEs determine general policies for specific groups of items held by the library. (For example, you can have an ITYPE for books and another ITYPE for DVDs. Each ITYPE would have different policies.) ITYPE policies include fine minimums and maximums. They also determine the length of time that Horizon should keep each item's circulation history.

(For more information, see "Preparing Horizon to Work with Item Records" in the *Circulation Setup Guide*.)

Understanding Borrower Circulation Types

Each entity (such as a person, department, or institution) to whom you want to circulate items must be represented by a borrower record in your borrower database. Horizon retrieves pertinent information from that record during circulation tasks. Your system administrator creates borrower circulation types (BTYPEs) and BTYPE groups and assigns borrowers to these groups to manage circulation.

BTYPEs determine general circulation rules for different groups of borrowers. (For example, you can have a BTYPE for residents and another BTYPE for non-residents. Each BTYPE would have different circulation rules.) General rules include limits on such things as the number of lost or overdue items and unpaid fines a BTYPE can have, and when a borrower's barcode should expire.

(For more information, see "Preparing Horizon to Work with Borrower Records" in the *Circulation Setup Guide*.)

Changing the Sounds for Circulation Events

Horizon has default sounds delivered for various Circulation events. You can change these sounds to whatever you want, as long as the sound is contained in a .wav file. The sound works for only your workstation.

Here is a list of the Circulation events that have a sound file and the name of the associated sound file:

Circulation Event	Sound File Name
At CheckOut if there is a block on a borrower	BkgdBlock.wav
At CheckOut when a barcode is reported as lost	LostBarcode.wav
An item is checked in successfully	SuccessfulCki.wav
An item is checked out successfully	SuccessfulCko.wav
An unacceptable character is entered	BadChar.wav
There is a barcode error	BkgBarcodeErr.wav
An item is checked in	BkgdCki.wav
An item is checked out	BkgdCko.wav
An item is created	BkgdItemCreate.wav
An item is <i>not</i> bookable overnight	BookableOvernite.wav
There is a new borrower	NewBorrower.wav
There is a PUI search string error	PuiStringErr.wav
There is a searching error	SearchErr.wav

To change the sounds for Circulation events

- 1 Find or create a .wav file to replace a Circulation sound.
- 2 Decide for which Circulation event you want to change the sound.
- 3 Go to the directory where the sounds are installed:
The default location is *Horizon_installation_location*\sounds.
- 4 If you want to save the old sound, rename it. (For example, rename the old sound to "SuccessfulCko_old.wav".)
- 5 Rename the new sound file to the same name as the old sound file. (For example, rename the new sound file to "SuccessfulCko.wav".)
- 6 Move the new sound file to the "sounds" directory.
- 7 Test the sound by performing the associated Circulation event.

Chapter 2: Checkout and Checkin

This chapter explains checkout and checkin procedures.

This chapter contains these topics:

- [About Checkout and Checkin](#) on page 17
- [Checking Out an Item](#) on page 18
- [Checking In an Item](#) on page 23
- [Renewing an Item During Checkout](#) on page 32
- [Printing Receipts and Workslips and Emailing Checkout Receipts](#) on page 34
- [Using an RFID pad Device for Checkouts and Checkins](#) on page 39

About Checkout and Checkin

Circulation helps keep track of where your library's items are when they are taken by borrowers. When you check out an item to a borrower, Horizon assigns that item's record to that borrower's record. Other borrowers know when they check the catalog that the item is temporarily unavailable. Checking the item back in clears the assignment of the item record from the borrower's record, and the catalog shows the item as available again.

Sometimes a borrower may want to keep an item for longer than the established borrowing period. Circulation allows you to renew the item and let the borrower keep it for an extended period. Circulation also lets you check out items to borrowers who have forgotten their cards, check in items without calculating fines, change the due date of an item when you check it out, and check out items that ordinarily do not circulate. Horizon Self-Serve Checkout lets borrowers check out items themselves.

Circulation lets you print several kinds of receipts that can help borrowers keep track of what they have checked out. During the checkin process, you can also print workslips that you can attach to items that need special attention. (For example, an item may need to be cataloged; put on hold for another borrower; or, if it is an interlibrary loan item, sent back to its holding library.)

Circulation uses the circulation privilege defaults set by your system administrator to determine loan periods, fine rates and so forth. (For more information on circulation defaults, see "Setting Up Circulation Privileges and Parameters" in the *Circulation Setup Guide*.)



Before you begin doing the checkout and checkin tasks, you need to know how to open the Checkout and Checkin processes and to identify borrowers and items. You can find these basic Circulation tasks in the "Getting Started" chapter.

For instructions, see [Starting Checkout and Checkin](#) on page 8, [Identifying a Borrower in Checkout](#) on page 11, and [Identifying an Item in Checkout or Checkin](#) on page 14.

This chapter explains these topics:

- [Checking Out an Item](#) on page 18
- [Checking In an Item](#) on page 23
- [Renewing an Item During Checkout](#) on page 32
- [Printing Receipts and Workslips and Emailing Checkout Receipts](#) on page 34

Checking Out an Item

To check out items to borrowers, you identify the borrower and the items to be checked out. When you do these steps, Circulation adds the new item to the list of items checked out by the borrower and calculates and displays the due date. (Horizon Self-Serve Checkout lets borrowers check out items themselves.) Circulation keeps track of the checked-out items and imposes fines if the borrower does not return an item on time. However, you can manually change the due date or even set an indefinite due date for items on permanent loan.

This section explains these topics:

- [Checking Out an Item Normally](#) on page 18
- [Changing the Due Date or Time During Checkout](#) on page 20
- [Checking Out an Item Using Horizon Self-Serve Checkout](#) on page 21

Checking Out an Item Normally

Checkout involves identifying the borrower, identifying the item the borrower wants to check out, and printing a borrower receipt. During a normal checkout, you can also see a list of all the items currently on loan to the borrower as well as a list of all current blocks for the borrower, and you can edit certain circulation information.

You may need to check out a non-circulating item. Circulation gives you the option to override the non-circulating status of an item and check it out to a borrower. Circulation determines the due date of a non-circulating item based on a special loan period for the item or on the default checkout period assigned for that type of borrower. Your system administrator sets this default.



If a borrower wants to check out an uncataloged item, you can fast-add that item to Circulation as you check it out. Later, depending on your library's policy, the item record can be edited, or deleted so that a new one can be created in Cataloging. (For instructions, see [Fast-Adding Item and Bib Records](#) on page 156.)

To check out an item normally

- 1 In the Checkout window, identify the borrower.

Note: If your library lets staff members enter partial barcodes during Checkout, they may be prompted to choose whether the barcode belongs to a borrower or an item. This happens if the significant digits in a borrower barcode match the significant digits of an item barcode.

Note: If your library has been configured to show borrower photos in the CKO window, the borrower's photo may also appear, if permitted by the borrower's BTYPE. If the borrower doesn't have a photo in his or her record, a placeholder image appears instead. For information on adding a photo to a borrower's record, see [Editing a Borrower Record](#) on page 139.

- 2 Identify the item and press **ENTER** or click **OK**.

Circulation checks out the item, sounds an audible signal, and displays the item and due date in the Items Out list box:

The screenshot shows a 'Checkout' window with the following details:

- Borrower:** Olsen, Alonzo (gstu - Graduate Student)
- Alt. ID:** 123097
- Email:** No Email Address
- Item or Borrower Barcode:** [Empty text box]

IType	Status	n_renewals	Due Date	Price
1. Fluidity and plasticity : by Eugene C. 21d	Checked out	0	06/25/15	39999006666232 0.00

At the bottom of the window, there is a 'Selection' field, 'Amt. Due 0.00', and 'Items Checked Out 1'. Below these are buttons for 'OK', 'Blocks', 'Edit Item', 'All Items Out', 'Clear', and 'End Session'.

Note: If your system is set up to print single due date slips, one will automatically print for each item as you check it out.

- 3 If you want to see a list of all items currently checked out to the borrower, click **All Items Out** or choose **CKO, All Items Out**.

Your system administrator can set up the All Item Out display options either to show or to exclude "Lost" or "Claimed Returned" items (For instructions, see "Changing Borrower Display Options for a Location" in the "Changing Circulation Display Options" section of the *Circulation Setup Guide*.)

- 4 You can get additional information from the Checkout window by clicking these buttons:
 - **Blocks.** This opens a list of current blocks for the borrower. (For more information, see [Viewing a Borrower's Current Blocks from Checkout on page 78.](#))
 - **Edit Item.** This lets you edit circulation information for the item you select in the list box. (For more information, see [Viewing and Editing Item Information in Checkout on page 152](#) or [Changing the Due Date or Time During Checkout on page 20.](#))
- 5 Repeat step 2 for any other items the borrower wants to check out.

You do not need to identify the borrower again for each item. Circulation retains the borrower until you identify another borrower.
- 6 Click **End Session** or choose **CKO, End Session**.

If the borrower owes any fees (for example, Rental Fees), the Session Payment window will appear (for details, see [Using Session Payment on page 89](#)). Either receive payment or waive the fee.

Note: You can enable or disable the End Session button on the Checkout window by selecting the **CKO, Enable End Session** menu option.
- 7 When you are through checking out items to the current borrower, press **F11** to print a borrower receipt so the borrower has a record of what items were checked out and when they are due back. (For more information, see [Printing Receipts on page 35.](#))

If you use another method to remind borrowers of item due dates, be sure to use it. (For example, you might need to stamp a due date slip or apply a due date sticker to the item.)
- 8 If you use a security system such as 3M or CheckPoint, treat the item before giving it to the borrower so that it will not set off the security system.

Note: If at any time you want to clear all of the borrower and checkout information from the Checkout window, click **Clear**. Circulation then displays a blank Checkout window.

Changing the Due Date or Time During Checkout

Although due dates and times are calculated automatically, you can manually adjust a due date or a due time for a borrower.

Some loaned items may have an indefinite due date. This is sometimes referred to as a permanent loan or an indefinite loan. Items on permanent loan may be recalled and loaned to other patrons, then returned to the original borrower after checkin. In Horizon, any due date past 12-31-2049 displays as an indefinite due date on the Checkout window.

To change the due date or time during checkout

- 1 Identify the borrower.

- Identify the item, or if the item is already checked out to the identified borrower, click **All Items Out**.

Horizon displays the item in the list box.

- Highlight the item in the list box and click **Edit Item**.

Horizon displays the Edit Checkout window:

- Make whatever changes are necessary in the **Due Date** and **Due Time** fields and mark the **AM** or **PM** button, as appropriate.
- If you want, you can enter a note in the **Note** field (which will display when the item is checked in) and in the **Internal Note** field (which the library staff views).
- Save your changes and close the Edit Checkout window.

Horizon displays the Checkout window showing the new due date and time (or shows it as Indefinite) in the list box.

Checking Out an Item Using Horizon Self-Serve Checkout



This explanation covers only Horizon Self-Serve Checkout. If you have a third-party self-check system (such as 3M), see the documentation for that self-serve product.

Horizon Self-Serve Checkout lets borrowers check out items themselves. If you want to, your system administrator can set up Horizon Self-Serve Checkout to require a borrower to enter his or her borrower code for *each item* checked out in a single session. This prevents another borrower from checking out an item using the previous borrower's barcode. Your system administrator must set this up. (For instructions, see "Requiring a Borrower Barcode for Each Self-Serve Transaction" in the "Using Self-Serve Checkout" section of the *Circulation Setup Guide*.)

If a borrower waits too long after entering a borrower code to enter other information or execute an action (such as clicking OK), Horizon displays a time-out message. The message states the number of seconds that the borrower has to press any key to continue the session. (The default is ten seconds.) If no key is pressed within that time, Horizon returns to the initial borrower login window at which the borrower must again scan or enter their borrower ID. Your system administrator can adjust the time-out period. (For instructions, see “Adjusting the Time-out Period for Self-Serve Checkout” in the “Using Self-Serve Checkout” section of the *Circulation Setup Guide*.)

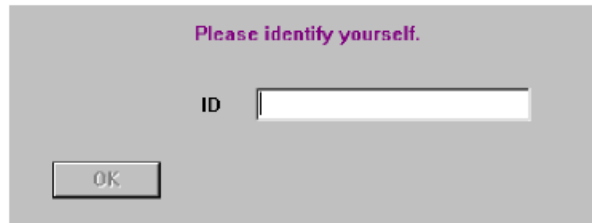
After you start the Horizon Self-Serve Checkout process, the borrower can do the rest of the steps in this task.

To check out an item using Horizon Self-Serve Checkout

- 1 Start the **Self-Serve Checkout** process.

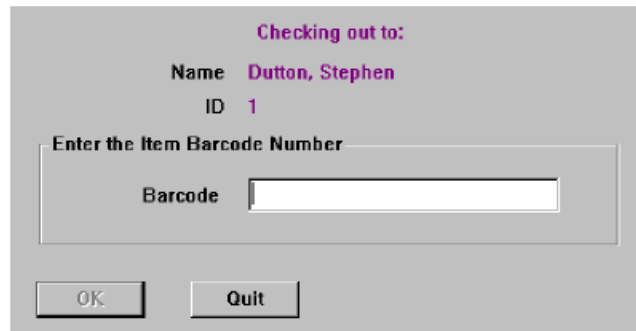
The default location of this process is the **Circulation** folder on the navigation bar.

Circulation opens the Self-Serve Checkout workspace with a window to enter the borrower ID:



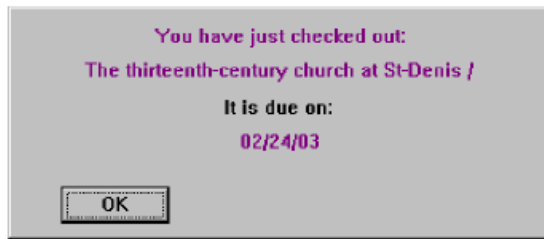
- 2 Scan or type in the borrower ID and click **OK**.

Horizon displays a window with the name and ID number of the borrower and a barcode field to enter the item's barcode:



- 3 Scan or type in the item's barcode and click **OK**.

Horizon displays a window showing the title of the item checked out and its due date:



4 Click **OK**.

If the borrower has any block fees (for example, Rental Fees), the Session Payment window will appear (for details, see [Using Session Payment on page 89](#)).

5 If you have additional items to check out, do one of these options:

- If Self-Serve Checkout is *not* set up for single-use checkout, repeat step 3 for each item.
- If Self-Serve Checkout is set up for single-use checkout, repeat steps 2 through 4 for each item.

6 Click **Quit** to end your checkout session, or do nothing and the process will time out.

The Self-Serve Checkout workspace returns with the borrower ID window open.

7 When you are ready to close Self-Serve Checkout, do these steps:

a Right-click the Windows taskbar and choose **Task Manager**.

Windows displays the Windows Task Manager window.

b In the Task window of the Applications tab, highlight **Self-Serve Checkout** and click **End Task**.

Windows closes Self-Serve Checkout.

c Close the Windows Task Manager window.

Checking In an Item

You can check in items as part of a morning routine or as an ongoing task throughout the day. Horizon uses the current date and time from your computer operating system as the date and time an item is checked in. But when you need to, Circulation lets you change the checkin date and time to something other than the current date and time.

Checkin typically involves scanning or entering the item barcode. You do not need to identify the borrower. But if you want to, you can set up the display options to show the borrower name. You can also choose how Circulation displays information for those items that you try to check in which are not checked out.

You can choose from among several checkin modes. These include normal, bookdrop, in-house use, and exempt fines modes. Occasionally, you check in items needing special handling—something more than just reshelving. This includes fast-added items and damaged items as well as items that fulfill a borrower's request. Circulation prompts you with the necessary action to take.

This section explains these topics:

- [Setting Up Checkin Display Options](#) on page 24
- [Setting Up a Checkin Mode](#) on page 25
- [Checking In an Item Normally](#) on page 27
- [Checking In a Fast-Added Item](#) on page 28
- [Checking in a Damaged Item](#) on page 29
- [Changing the Checkin Date or Time](#) on page 31
- [Restarting the Clock](#) on page 31

Setting Up Checkin Display Options

Although you do not need to identify a borrower when you check in an item, you have the option to set up the checkin display to show the borrower name. When you choose to show the borrower's name, the name appears to the right of the Barcode field, and items in the list view relate to the borrower shown. When you then check in an item that was checked out by a different borrower, Horizon clears the list view to display items checked in from the new borrower.

When you choose to show the borrower's information, a window showing the borrower's current blocks displays when an item is checked in. You have the option to hide this window. If you choose not to show the borrower, Horizon does not display current blocks for the borrower.



Your system administrator can set up your system to display the name of the borrower during Damaged Mode checkin, even if you do not choose the CKI-Show Borrower display option. (For instructions, see “Changing Circulation Display Options” in the *Circulation Setup Guide*.)

When you try to check in an item that is not currently checked out, Circulation displays an Item Not Out checkin message, and the item does not display in the list view. You can choose to hide the Item Not Out message. You can also change the display options so that items that are not checked out *do* appear in the list view during checkin.

When you check in an item that has a hold request on it, Horizon displays a message indicating the hold. You have the option to cancel the hold or to leave the item on hold. If you choose to leave the item on hold, Horizon displays a message directing you to put the item on the hold shelf. You can choose to hide the message on any or all individual workstations.

To set up Checkin display options:

- 1 Open the Checkin/Request Processing window.

2 Do one or more of these options:

To do this	Do this
Display the name of the borrower	Choose CKI, Show Borrower . When you check in an item, if there are any blocks associated with its borrower, Horizon enables the Show Blocks button at the bottom of the window. To display the displayed borrower's blocks, choose CKI, Show Blocks .
Hide the current blocks on the borrower's account when an item is checked in	Choose CKI, Hide Blocks window at CKI This option is only available when Show Borrower is enabled.
Hide the Item Not Out message	Choose CKI, Hide 'Item Not Out' message .
Display items that were not checked out	Choose CKI, Always Put in List .
Hide the Hold Shelf message	Choose CKI, Hide 'Place Hold on Shelf' message .

Setting Up a Checkin Mode

You can choose from among five checkin modes. When you first open Checkin, Horizon defaults to the Standard checkin mode. If you choose a different checkin mode, Horizon uses that mode to check in items until you choose a different mode or until you close Checkin and reopen it. Whenever you use an option other than Standard, Horizon displays the name of the checkin mode you are using at the top of the window.

Here are the checkin modes you can choose:

- **Standard.** This is the default mode and lets you check in library items normally: at the current date and time, as a regular circulating item, and assessing fines if due.
- **Bookdrop.** When you check in an item, Circulation typically applies the current date and time. You may need to change the checkin date to something other than the current one. (For example, you may have too many items to check in before closing for the day. Or you may be checking in items left in the bookdrop overnight.) The Bookdrop mode automatically changes the checkin date to the previous day (or the library's last open day) and changes the time to one minute prior to the closing time of that date. Turning Bookdrop mode off automatically restarts the clock and sets the date to the current date.
- **In-House Use.** If you want to keep track of usage for non-circulating or other items that are used within the library without being checked out, you can check in the items using the In-House Use mode. When you check the item in, Circulation records that the item has been used. It then displays the item's status as if you had checked in an item that had been checked out. (For more information, see [Accessing In-House Use Information for an Item](#) on page 174.)

- **Exempt Fines.** Occasionally, you may not want to require a borrower to pay fines on overdue items. (For example, due to an unscheduled hospital stay, a borrower is unable to return items before they become overdue.) The Exempt Fines mode exempts the borrower from any fines.
- **Renewal.** Horizon renews the item for the borrower to whom it is currently checked out. Horizon first checks to see if the item has been requested by another borrower, if the borrower is over his or her limit of renewals, or if there are blocks on the borrower record. (For more information, see [Renewing an Item During Checkout on page 32.](#))

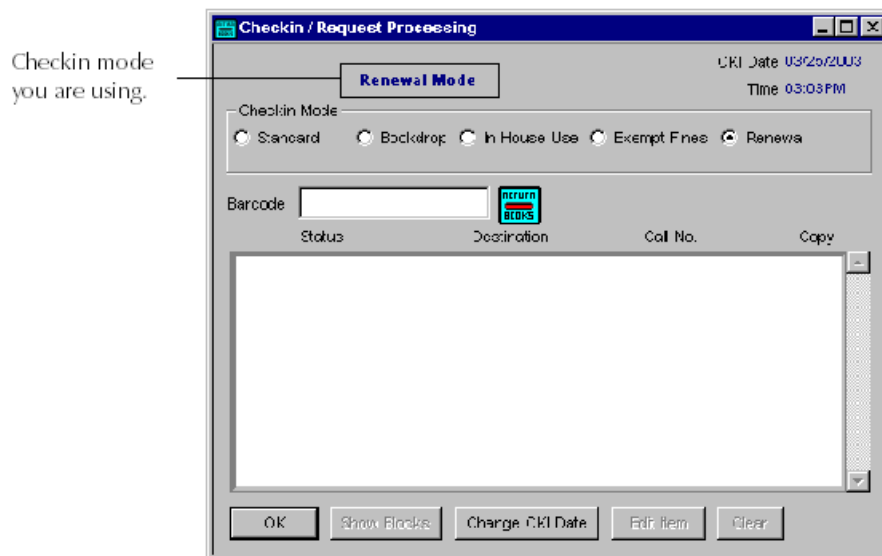


In conjunction with the Bookdrop, In-House Use, Exempt Fines, or Renewal modes, you can choose the Damaged Mode checkin option when you need to check in a damaged item. (For instructions, see [Checking in a Damaged Item on page 29.](#))

To set up a Checkin mode

- 1 Open the Checkin/Request Processing window.
- 2 Mark one of these modes:
 - Standard
 - Bookdrop
 - In-House
 - Exempt Fines
 - Renewal

If you choose a mode other than Standard, Horizon displays the name of the mode you chose:



- 3 When you finish checking in items in the selected mode, repeat step 2 to choose another mode.

Checking In an Item Normally

When you check in an item, Circulation typically does these things:

- Checks to see if the item is overdue and imposes the correct fine, if necessary.
- Changes the item's status to Shelving Cart, indicating that the item has been checked in but is not yet on the shelf. When borrowers search for the item, they will know the item has been checked in recently and is on the shelving cart. (Your system administrator sets up the length of time that an item remains on Shelving Cart status as part of library policy.)
- Records in the borrower record that the item has been checked in.
- Prompts you if the item has been recalled, requested, or is in transit from another location.

You can also get information about a borrower's blocks, change the checkin date and time for the current session, or edit item information.

As a part of the checkin routine, you should reset any item security devices that your library uses.

Before you begin

Before you begin checking in items, you need to decide these things:

- Which checkin mode you want to use.
- Whether to show borrower names during checkin.
- Whether to show current blocks for the borrower.
- Whether to show information about items you check in that weren't checked out.

For more information, see [Setting Up a Checkin Mode on page 25](#) and [Setting Up Checkin Display Options on page 24](#).



If at any time you want to clear the borrower and checkin information from the Checkin/Request Processing window, click **Clear**. Circulation then displays a blank Checkin/Request Processing window.

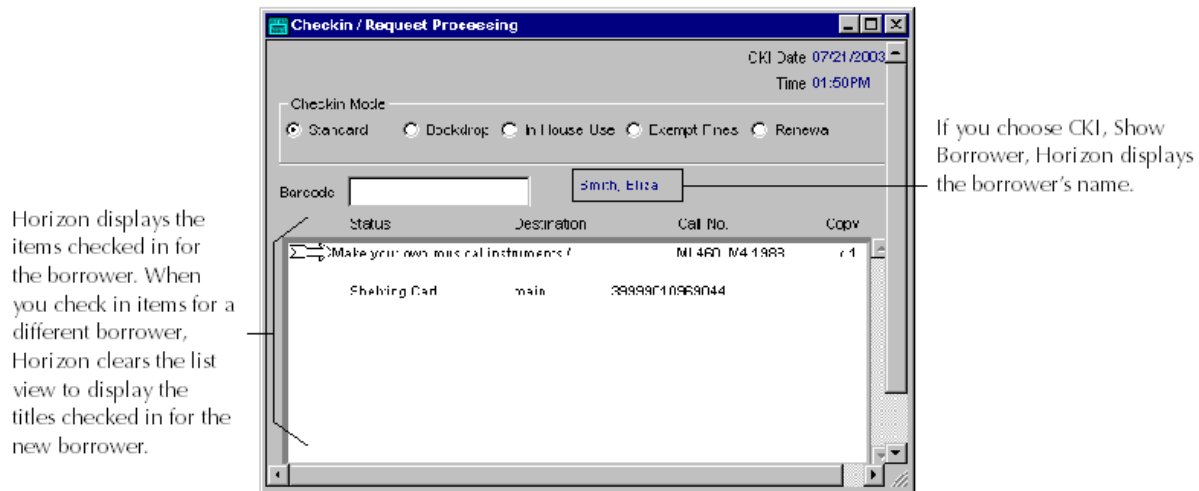
To check in an item normally

- 1 In the Checkin/Request Processing window, identify the item and press **ENTER** or click **OK**.

Horizon checks in the item, sounds an audible signal, and displays the title and other information in the list box. This information includes the status Shelving Cart.

Note: If CKI Location Control has been activated and configured for your location, Horizon displays an alert if it checks in an item belonging to another location. Depending on your library system's implementation of the feature, Horizon either disallows the checkin or prompts for a confirmation before allowing the checkin.

Here is an example of the checkin window:



If the item you checked in is currently on hold, an **Item on Hold** message appears. Click **OK** to complete the checkin and make the item available for pickup, or click **Cancel** to complete the checkin without making the item available for pickup.

You can also retrieve or change information through the Checkin/Request Processing window by clicking these buttons:

- **Show Blocks.** This displays the blocks of the borrower who most recently checked out the item selected by the arrow in the Checkin/Request Processing list box. (For more information, see [Chapter: Chapter 4, "Blocks" on page 65.](#))
- **Change CKI Date.** This displays a window in which you can change the checkin date and time.

Until you restart the clock or until you close Circulation and reopen it, Circulation will continue to use the new checkin date and time for all subsequent items that you check in. (For more information, see [Changing the Checkin Date or Time on page 31.](#))

- **Edit Item.** This lets you edit circulation information for the item you select in the Checkin/Request Processing list box. (For more information, see [Viewing and Editing Item Information in Checkout on page 152.](#))

- 2 Repeat step 1 for each item you want to check in.
- 3 If you use a security system such as 3M or CheckPoint, be sure to reset the security on each item before you put it on the shelving cart.

Checking In a Fast-Added Item

A fast-added item is one for which a short bib record was created, usually at the time of checkout. This is typically done when a borrower wants to check out an uncataloged item. (For more information see [Fast-Adding Item and Bib Records on page 156.](#))

When you check in a fast-added item, Horizon prompts you with one of these actions:

- **Do nothing.** Check in the item as usual and reshelve it. The record remains unchanged in the database.
- **Send the item to cataloging staff to be completely cataloged.** Horizon does not delete the fast-added bib or item record.
- **Delete the item record but keep the bib record.** Horizon displays a message informing you of the deletion.
- **Delete both the item and the bib record.** Horizon displays a message informing you of the deletion.



Your system administrator can specify for each collection which fast-add action should occur when items of that collection are created and checked in.

To check in a fast-added item

- 1 In the Checkin/Request Processing window, identify the item.

If the item you checked in is currently on hold, an *Item on Hold* message appears. Click **OK** to complete the checkin and make the item available for pickup, or click **Cancel** to complete the checkin without making the item available for pickup.

Horizon then displays a message describing any action to be taken.

- 2 Click **Continue** to acknowledge that you have seen the message.

Horizon checks in the item, sounds an audible signal, and displays the title and other information in the list box. This information includes status such as Fast Add, and Shelving Cart or In Cataloging.

Note: If CKI Location Control has been activated and configured for your location, Horizon displays an alert if it checks in an item belonging to another location. Depending on your library system's implementation of the feature, Horizon either disallows the checkin or prompts for a confirmation before allowing the checkin.

- 3 Follow your library's procedure to handle this type of fast-added item.

Checking in a Damaged Item

Occasionally, you may check in an item that is damaged and want to prevent the damaged item from circulating until it is repaired. By using the damaged check-in mode, you make the item unavailable for certain circulation activities. This is true even if the item has already been identified as available for one of these actions:

- Requests
- Holds
- Reserve
- Booking
- CSA request
- Z39.50 availability

- Z39.50 holds

For example, if there is a hold on the item or if an item is set to transit, Horizon cancels the action when the item is checked in as damaged. Horizon then notifies the requesting borrower or location of the cancellation.

Your system administrator can set up the Damaged Mode checkin option to automatically display the name of the borrower who had it checked out. (For instructions, see “Changing Circulation Display Options” in the *Circulation Setup Guide*.)

To check in a damaged item

- 1 Open the Checkin/Request Processing window.
- 2 Choose **CKI, Damaged Mode**.

Horizon displays the Checkin/Request Processing window with a notation in red next to the Barcode field that you are now in the Damaged Checkin mode.

- 3 Check in the damaged item.

Horizon displays the item in the list box with a status of “Damaged.”

Horizon shows the item checked in with a status of “Damaged.”

If you choose CKI, Show Borrower, Horizon displays the borrower’s name.

Horizon lets you know you are in Damaged Checkin mode.

Status	Description	Call No.	Copy
Damaged	Making marvelous wood toys /	TT174.5.W6 L86	c.1
	Make your own musical instruments /	ML460 .M4 1983	c.1
	Shelving Cart	38999C10969044	

Note: If an item is checked in as damaged by mistake, choose **CKI, Damaged Mode** to exit Damaged Mode. Then check the item in again using regular checkin procedures.

If the Show Borrower option is enabled, Horizon displays the borrower’s name next to the Barcode field. If Hide Current Blocks is disabled, Horizon displays a window showing the borrower's current blocks when an item is checked in.

- 4 Scan or enter the barcode for the next item.

Horizon asks if you want to exit Damaged Checkin Mode.

- 5 If you want to continue checking in items as damaged, click **No**; otherwise, click **Yes**.

- When the item is repaired, you can return the book to circulation by checking it back in.

Changing the Checkin Date or Time

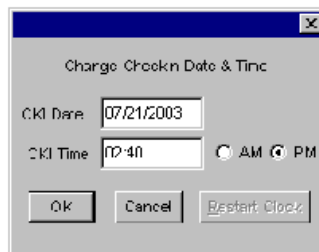
Horizon uses the current date from your computer operating system as the date an item is checked in. You may need to change the checkin date to a date other than the current one.

For example, a borrower may return an item long past the due date because he or she was on an extended vacation. While you may not want to completely exempt the borrower from fines and fees, you may be willing to lessen the charges. You can do this by changing the checkin date to an earlier date.

To change the checkin date or time

- Open the Checkin/Request Processing window.
- Click **Change CKI Date**.

Horizon displays the Change Checkin Date & Time dialog box:



- Enter the checkin date and time you want to use and mark the **AM** or **PM** button, as appropriate.
- Click **OK**.

The new checkin date and time display at the top-right corner of the Checkin/Request Processing window. The date and time display in italics to indicate that the clock is stopped.

- When you are ready to return Checkin to the correct date and time, continue with ["See "Restarting the Clock ".](#)

Restarting the Clock

Whenever you change the checkin date and time, Circulation freezes the clock so that all your checkins will reflect the change. This happens even if you change only the date. You need to restart the clock when you finish checking in items for the changed date and time so that any subsequent transactions you make will record the correct date and time.

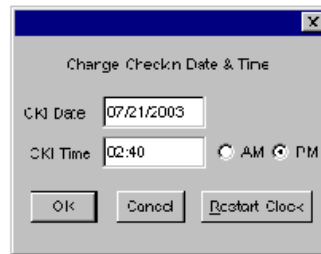


If you leave your circulation station or are otherwise interrupted when you are working with an altered checkin date or time, you should restart the clock to avoid any problems that the altered date and time may cause.

To restart the clock

- 1 Open the Checkin/Request Processing window.
- 2 Click **Change CKI Date**.

Horizon displays the Change Checkin Date & Time dialog box:



- 3 Click **Restart Clock**.

Horizon displays the current date and time at the top-right corner of the Checkin/Request Processing window.

Renewing an Item During Checkout

In Circulation, you can renew one or more items at a time for a borrower. These conditions govern whether a borrower can renew an item and for how long:

- **Renewal Limits.** This limits the number of times a borrower can renew a library item. If a borrower attempts to renew an item more times than the limit allows, Horizon prompts you that the maximum has been reached. You can check the book back in and check it out again to the same borrower, or you can override the renewal limit.

A borrower can also renew an item by phone. As with “in person” renewals, Circulation allows only a certain number of phone renewals to be made for a selected item. The number of phone renewals allowed may be different than the number of regular renewals.

- **Renewal Due Date.** Depending on the borrower’s and the item’s classifications, the renewal loan period may be shorter than the original checkout loan period.

Your system administrator sets up these conditions as determined by library policy.



You can also renew items during checkin. (For more information, see [Setting Up a Checkin Mode](#) on page 25.)

To renew an item during checkout

- 1 In the Checkout window, identify the borrower.

2 Click **All Items Out**.

Horizon displays a list of all items checked out to the borrower.

3 Do one of these options:

To do this	Do this	Or this
Renew one item	<ol style="list-style-type: none"> 1. Scan the item barcode or enter it in the Item or Barcode field. 2. Click Yes when Horizon asks if you want to renew the item. 	<ol style="list-style-type: none"> 1. Highlight the item you want to renew and choose CKO, Renew.
Renew more than one item	<ol style="list-style-type: none"> 1. Scan the item barcode or enter it in the Item or Barcode field. 2. Click Yes when Horizon asks if you want to renew the item. 3. Repeat steps 1 and 2 for each item that you want to renew. 	<ol style="list-style-type: none"> 1. Highlight the items you want to renew and choose CKO, Renew.
Renew all items	<ol style="list-style-type: none"> 1. Scan the item barcode or enter it in the Item or Barcode field. 2. Click Yes when Horizon asks if you want to renew the item. 3. Repeat steps 1 and 2 for each item. 	<ol style="list-style-type: none"> 1. Choose CKO, Renew All, OR highlight all the items and choose CKO, Renew.

Horizon displays a message asking if the items are present.

Note: You cannot renew “Lost” or “Claimed Returned” items unless the items are present. If a “Lost” item is present for renewal, Horizon first clears the Lost block for the item and then renews it.

4 Do one of these options:

- If the items are present, click **Yes**.

Horizon renews the items and displays the new due date in the list box.

- If the items are not present, click **No**.

Horizon counts the renewal as a phone renewal.

Horizon displays only the renewed item in the current checkout display. If you print a receipt for the current session, the receipt lists only items checked out or renewed during the session.

A message displays if the borrower has reached his or her limit for the selected item. You can override the renewal limit if you are authorized to do so. Messages also display if the user has exceeded maximum limits for fines and overdue items.

5 Click End Session.

If the borrower owes any fees (for example, Renewal Fees), the Session Payment window will appear (for details, see [Using Session Payment on page 89](#)). Either receive payment or waive the fee.

Printing Receipts and Workslips and Emailing Checkout Receipts

Horizon lets you attach a printer to a workstation at your circulation desk to print circulation slips that describe library transactions. You can print two types of circulation slips: receipts for borrowers and workslips for staff members. Your system administrator sets up the types of receipts and workslips that print at each workstation. (For instructions on setting up these and other printer options, see “Using Circulation Slips and Receipts” in the *Circulation Setup Guide*.)

You print receipts to help borrowers keep track of their library transactions, such as items they have checked out or fines they have paid. You print workslips to notify library staff that an item needs special attention, such as a book that needs to be sent to the bindery when it is checked back in.

Additionally, if a borrower has an email address in the borrower record, you can email electronic checkout receipts in place of or in addition to printing hard copies if your administrator has allowed it in your location's record. The Allow Email Checkout Receipt setting in the borrower record determines whether Horizon should email checkout receipts to the borrower. For more information on the Allow Email Checkout Receipt setting, see [Editing a Borrower Record on page 139](#).



Choose **Tools, Change Receipt Options** to display the Workstation Receipt Options window when the Checkout or Checkin/Request Processing window is open. You must mark the Allow Printing of Slips and Receipts box for any slips to print or for the hot keys to work.

If you want to be able to email checkout receipts, mark the Allow Emailing of Checkout Receipts box; the Allow Emailing of Checkout Receipts option in the receipt options and the Allow Email Checkout Receipts option in the borrower record must both be enabled for Horizon to email checkout receipts to that borrower. You can only modify the value of the Allow Emailing of Checkout Receipts option if an administrator has allowed the emailing of checkout receipts in your location's record.

Check with your system administrator before making any changes.

Horizon prints all print receipts automatically except group checkout receipts. You can use the menu bar or hot key combinations to print group receipts.



If your staff wants to print a group receipt but due date or checkin single receipts are set to print automatically, they can print a separate group receipt after the group checkout is complete.

This section explains these topics:

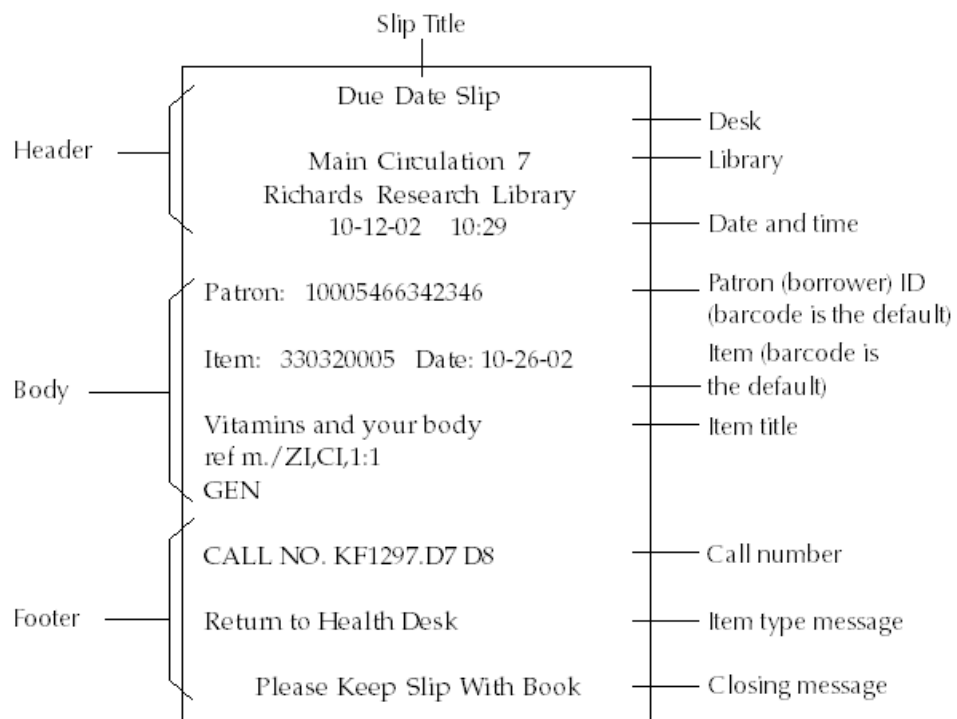
- **Printing Receipts** on page 35
- **Emailing Checkout Receipts** on page 37
- **Printing Workslips** on page 38

Printing Receipts

Horizon can print receipts for borrowers in one of two ways:

- Automatically when a library transaction is completed.
- Manually when a borrower requests a receipt.

Here is an example of a borrower Due Date slip:



You can print these types of receipts:

- **Due Date Slip.** A single-item receipt that lists one item that has been checked out and its due date. This receipt prints individually at checkout as you enter each barcode.
- **Multiple Due Date Slip.** A multi-item receipt that lists all items that have been checked out, their due dates, and the total number of items that have been

checked out to a borrower for the current transaction. You can print this receipt by pressing **F11** after scanning in the last barcode.

- **Single Checkin Receipt.** A single-item receipt that lists one item that has been checked in and the date. This receipt is printed individually at checkin as you enter each barcode.
- **Renewal Receipt.** A multi-item receipt that lists all items that a borrower has renewed, the new due date, and the total number of items renewed. You can print this receipt by pressing **F11** after scanning in the last barcode.
- **Patron Payment Receipt.** A receipt that lists the amount that a borrower has paid for an overdue item or other library fee.
- **Patron Refund Receipt.** A receipt that lists the amount that a borrower receives as a refund.
- **Waiver Receipt.** A receipt that lists the amount waived for a fine or fee.

Printing Waiver Receipts

Horizon allows you to print waiver receipts.

This section explains these topics:

- [Configuring waiver receipt options and formatting on page 36](#)
- [Printing the waiver receipt on page 37](#)

Configuring waiver receipt options and formatting

Before you can print the waiver receipts, you must configure the system and the waiver receipt options.

To configure waiver receipt options and formatting

- 1 Open the Horizon client and log in.
- 2 If you have not yet set up the waiver receipt, continue with step 3. Otherwise, skip to [Printing the waiver receipt on page 37](#).
- 3 Open a Checkout window.
- 4 Go to **Tools > Change Receipt Options**.
The Workstation Receipt Options dialog box displays.
- 5 Verify that the **Allow Printing of Slips and Receipts** checkbox is marked.
- 6 Mark the **Patron waiver receipt** checkbox.
- 7 If necessary, change the printer where you want the waiver receipt to print.
- 8 Go to **Administration > Table Editor**.
- 9 Select the **circ_slip** table, and then click **OK**.
- 10 Select the **waive** (Patron waiver receipt) slip, and then click **Edit**.

- 11 Modify the formatting for the waiver receipt as desired, or use the default format provided.
- 12 Click **Save** to save your settings, and then click **Close** to close the window.

Printing the waiver receipt

After you have enabled waiver receipts, you can print them when you waive fees for a borrower.

To print the waiver receipt

- 1 Open the Horizon client and log in.
- 2 Go to **Blocks > Waiver**.
The Waiver of Fine dialog box displays.
- 3 In the **Amount** field, type the currency amount that is being waived.
- 4 In the **Comment** field, add any applicable comments.
- 5 Mark the **Print Waiver Receipt** checkbox.
- 6 Click **OK** to print the receipt to the printer (as specified in step 7 of [See "Configuring waiver receipt options and formatting"](#)).

Emailing Checkout Receipts

As an alternative to or in addition to printing checkout receipts, you can email a borrower an electronic version of the checkout receipt if the borrower has an email address specified in the borrower record and an administrator has configured Horizon to allow the emailing of checkout receipts for your library.

The Allow Email Checkout Receipt setting in the borrower record determines whether Horizon should email checkout receipts to the borrower. For more information on the Allow Email Checkout Receipt setting, see the "Editing a Borrower Record" topic of the *Circulation User Guide*.

The information included in the receipt and the receipt's layout can be configured in the circ_slip table. For more information, see the "Customizing Circulation Slips" topic of the *Circulation Setup Guide*.

These instructions assume the following:

- An administrator has set your location to allow emailing of checkout receipts by marking the Allow Emailing of CKO Receipts option in the location record. For more information, see the "Setting Up a Location Record" topic of the *System Administration Guide*.
- You have marked the Allow Emailing of Checkout Receipts option in the Workstation Receipt Options. For more information, see [Printing Receipts and Workslips and Emailing Checkout Receipts on page 34](#).

- The borrower has the Allow Email Checkout Receipt option marked in the borrower record. For more information, see [Editing a Borrower Record](#) on page 139.

To email checkout receipts to a borrower

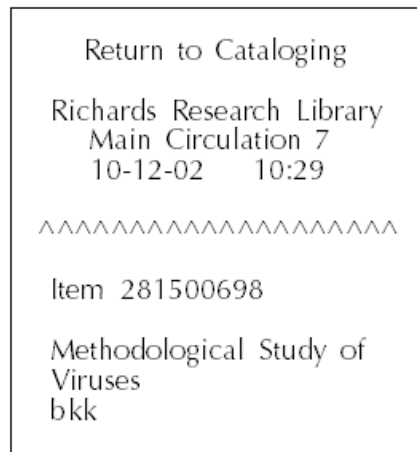
- 1 If you have not already done so, check out items to an individual borrower. (For instructions, see [Checking Out Items to Borrowers](#).)
- 2 While at the Checkout window, do one of the following:
 - Choose **File, Multi-Item Slip** (or press **F11**) to email a receipt with all the borrower's checked out items.
 - Choose **File, Single Item Slip** (or press **Ctrl+F10**) to email a receipt with just the borrower's most recently checked out item.

Horizon emails the receipt.

Printing Workslips

Workslips print at checkin to notify staff that an item needs special attention. (For example, a fast-added item might need to be sent to cataloging.) You can attach these workslips to the item and take care of the item at a later time.

Here is an example of a staff workslip:



These are the workslips you can print:

- **Hold Slip.** Notifies staff that the item has been requested and needs to be placed on the hold shelf. (The barcode, phone number, and e-mail address of the borrower who made the request are also printed on the workslip.)
- **In Transit Slip.** The In Transit workslip notifies staff that the item needs to be sent to the library location specified.
- **Needs Cataloging.** The Needs Cataloging workslip notifies staff that the item needs to be cataloging.

If your system administrator has set up your workstation to print workslips, they will print automatically.

Using an RFID pad Device for Checkouts and Checkins

Horizon supports the use of RFID pad devices with the Horizon client for checkouts and checkins. Two options are available within the CKO and CKI windows that allows you to enable or disable RFID interaction; one option enables communications with a 3M RFID Tracking Pad, while the other enables communications with a Bibliotheca RFID pad.

Once you have enabled RFID interaction, the Horizon client will allow you to use your connected RFID pad device in the CKO and CKI windows.



Using an RFID pad device does not change the checkout and checkin workflows. All the same Circulation Rules (regarding fees, max checkouts, renewals, item rules, etc.) apply even when using an RFID pad device.

This section explains how to enable RFID pad device integration in the Horizon client and also gives you some tips for troubleshooting.



For information about installing and setting up a 3M RFID Tracking Pad, see 3M's documentation.

For information about installing and setting up a Bibliotheca RFID pad device, see the *Bibliotheca liber8:connect™ Installation Guide* available for download from the SirsiDynix Customer Support website at <https://support.sirsidynix.com>.

To enable RFID connection in CKO/CKI

- 1 Check to make sure the RFID pad device is connected and working properly. Refer to the appropriate RFID pad device vendor's documentation to make this verification.
- 2 Launch your client.
- 3 Open the CKO or CKI window.
- 4 In the menu bar, go to **CKO** (or **CKI**) and do one of the following:
 - If you are using the 3M RFID Tracking Pad, select **Enable RFID (3M)**.
 - If you are using a Bibliotheca RFID pad, select **Enable RFID (Bibliotheca)**.

The CKO/CKI window is now connected with the RFID pad device and you can use it in checkouts and checkins. RFID will remain enabled (even if you close and restart the Horizon client) until you select to disable it.

Note: If you use the RFID pad device in the CKO window, the pad will not scan any item barcodes until you first enter a valid borrower barcode.

To disable the RFID connection in CKO/CKI, deselect the RFID option you selected in the menu bar. (You can enable and disable RFID connection within a single session, if needed.)

Tips/Troubleshooting

- Once you have performed an action on an item that has been scanned by the RFID pad device, the pad will not read the item again unless you first clear the list or close the CKO/CKI window. You can also use the **End Session** button in the CKO window.

For example, if you open the CKI window and scan an item in using the RFID pad device, the item will appear on the CKI list. If you move over to the CKO window and put the same item on the pad, the pad will not read the item until you first either Clear the CKI list or close the CKI window.

- Error messages will appear for the following reasons:
 - The RFID pad device is not connected correctly.
 - The user is removing items from the RFID pad device too quickly, before the checkin/checkout process is completed.
 - A Circulation or Item Rule blocks the process during checkin/checkout.

Errors will occur on an item-by-item basis. If you have multiple items on the pad that break either Circulation or Item Rules, these errors will occur individually for each item before moving on to the next item.

- If you are using the RFID pad device to checkin a very long list of items without ever leaving the CKI window, you may occasionally want to clear the CKI list in the Horizon client, so that the cache of checked in items does not get too long at any given time.

Chapter 3: Hold requests

This chapter discusses several different tasks involving the hold request process, including placing and filling requests, reordering the request queue, and overriding a hold.

This chapter contains these topics:

- [About Hold Requests](#) on page 41
- [Placing a Hold Request for a Borrower](#) on page 42
- [Editing a Hold Request](#) on page 44
- [Filling a Hold Request](#) on page 47
- [Recalling an Item to Fill a Request](#) on page 52
- [Viewing a Borrower's Hold Requests](#) on page 53
- [Deleting a Hold Request](#) on page 54
- [Reordering the Hold Request Queue](#) on page 56
- [Reassigning a Borrower Hold Request](#) on page 58
- [Overriding a Hold](#) on page 62

About Hold Requests

Horizon lets borrowers electronically request items that are checked out (or available only at another location) so that when they are returned, the requesting borrower has the first option to check out the item. If an item remains in the request queue without being checked in for a certain period of time, Horizon cancels the request. Your system administrator sets up the time period between placing the request and cancelling it.

Once a requested item is checked in and Day End is run, Horizon places the item on the Request Pull List. (For more information, see [Accessing the Request Pull List](#) on page 171.) You use this list to gather the requested items so that you can hold them for the requesting borrowers. This means the item is put in a special place and the borrower is notified so no other borrower can check out the item until the requesting borrower has a chance to check it out. Circulation changes the item status to "Item Being Held" and places a Hold Shelf block on the requester's record. When Day End is run, the block prompts Circulation to generate a hold notice. You can print the notice and send it to the requester, notifying her or him that the requested item has been checked in. The borrower can then come in and check out the item. If an item on hold is not picked up within a certain period of time, Horizon will cancel the hold. Your system administrator sets up the length of time that an item remains on the hold shelf.

You may need to check out an item on hold to a borrower other than the one who has requested it. Horizon lets you override holds and check out items to other borrowers without removing the hold request from the item. (For example, if a requesting borrower is on vacation, you could check a requested item out to another borrower. The hold request remains in place so that when the item is returned again, the requesting borrower still has the option to check it out.)

Occasionally a borrower places a hold request for an item currently checked out to another borrower. You can recall that item before its original due date so that the new borrower can have the item sooner. (For example, if a professor needs a projector on Wednesday but the equipment is not due until Friday, you can recall the projector by letting the borrower who has the projector know that he or she should bring it back Tuesday so that another can use it.)

Variables set in Circulation determine the priority level of borrowers' requests. Normally, Circulation fills hold requests in the order they are made. For example, a request made on Monday will be filled before a request made the following Friday. Your system administrator, however, can program other variables. For example, Circulation can fill all hold requests placed by borrowers at your location before filling requests made at other locations.



Although hold requests are usually made for a borrower, they can also be used for library needs. (For example, you may want to send a book to the bindery when it is checked back in. A hold request can catch the book before it is returned to general circulation.)

Placing a Hold Request for a Borrower

You can place a hold request on behalf of a borrower for an item that is currently unavailable. You can do this at either an item level (when the borrower wants a specific copy—for example, the large-print version) or the bib level (when any copy of the item will do).



Before you can place an item-level request, your system administrator must add the “ /t ” switch functionality to the New Search process in the Launcher. (For more information, see “Adding Command-Line Arguments to a View or Process” in the “Changing Administration-Level Settings on the Navigation Bar” section of the “Security and Preferences” chapter of the *System Administration Guide*.)

Borrowers may also place their own hold requests if your system administrator has set up your public search to let them.

When you place the request, Horizon displays a message in the Hold Request window suggesting that the borrower confirm or update their contact information. Keeping contact information current helps you deliver hold notifications and other library communications to the borrower. You can edit a borrower's contact information at the same time that you place the hold request.



Your system administrator sets up the contact information and message that Horizon displays. (For more information, see your system administrator.)

To place a hold request for a borrower

1 Identify the requesting borrower in **Checkout**.

Horizon displays the borrower's name in the Checkout window.

2 Do one of these options:

- If you want to place a bib-level request for the borrower, search (F2 or File-Search PAC) for the requested title. At the Title Summary screen, highlight the desired title, or click **Show Detail** to access the Bibliographic Detail window.

Note: If Horizon displays a Titles list window, you must choose the title that you want to Request by clicking on it or scrolling to the desired line and pressing the space bar.

- If you want to place an item-level request for the borrower, search for the requested title and click **Show Copies** to see the Copy or Item detail window.

Note: If you initiate a request from the Copies window, Horizon limits its search for the item to the specific item number that you are requesting. Horizon accesses no bib-level information from the Copies window.

Horizon displays the item's status at the top of the window or in the list window.

3 Choose **Request**, **Make Request** or press **F5**.

Horizon displays the Place Standard Hold Request window for the borrower:

Mark this box to confirm an item-level request for a specific copy.

Message to update borrower's contact information.

4 If you make an item-level request in step 2, mark the **This Copy Only** box to confirm that you want the specified copy.

This box is grayed out if you do not choose a specific copy in step 2.

Note: If you decide you do not want a specific copy after all, do *not* mark the box, and Horizon continues with the request on a bib-level.

- 5 Enter the pickup location code in the **Pickup Location** field.

The pickup location is the branch of your library where the requester will pick up the item. The pickup location prints on the hold notice you send to the borrower.

- 6 In the **Comment** field, enter any additional information that you want printed on the hold notice sent to the requester.
- 7 Click **Request**.

Horizon displays a message that the request has been made.

Note that Horizon may not allow you to continue the hold request process for one of these reasons:

- The borrower cannot pick up items at this location.

If Horizon displays this message, your system administrator may need to edit the circulation parameters in the Table Editor.

- Borrowers of this type cannot make requests at this location.

If Horizon displays this message, the location's circulation privilege "allow requests" is set to disallow hold requests by this borrower type. Check with your system administrator to change this setting, if necessary.

- 8 Click **OK**.

To change the borrower's contact information

- 1 Display the Checkout window for the borrower.
- 2 Choose **Borrower, Edit Borrower**.

Horizon opens the Edit Borrower window.

- 3 Edit the contact information fields as necessary. (For instructions, see "Editing a Borrower Record" in the "Managing Borrower Records" section of the "Borrower and Item Records" chapter of the *Circulation Guide*.)
- 4 Save your changes.



If you see the following error message: "Request failed: Receive timed out. Server may be unavailable; please try again later.", chances are that there is a connection problem between the Horizon server and the HIP server, which actually places the requests. Please check with your system administrator to make sure the HIP server is in operation and that the communication between these servers is active.

Editing a Hold Request

At any time before a requested item is actually checked in and placed on the hold shelf—even if it is in transit—you can make several changes to the hold request.

For example, you can change the pickup location for an item, add or edit a comment, change the hold request and hold expiration dates, or even suspend the hold request. Suspending a hold request allows borrowers to maintain their position in the request queue even if they do not need an item until after a specified date, such as after they return from vacation. The hold request still advances in the queue, but it will not be filled until it is automatically reactivated on the “suspend until” date.

Your system administrator must enable the “Edit request” program feature in the passkey table before you can do these editing tasks.



Once a requested item is on the hold shelf, you can no longer edit the Pickup Location, Request Expire, or Suspend Until fields. However, you can still edit the Hold Expire and Comment fields.

To edit a hold request

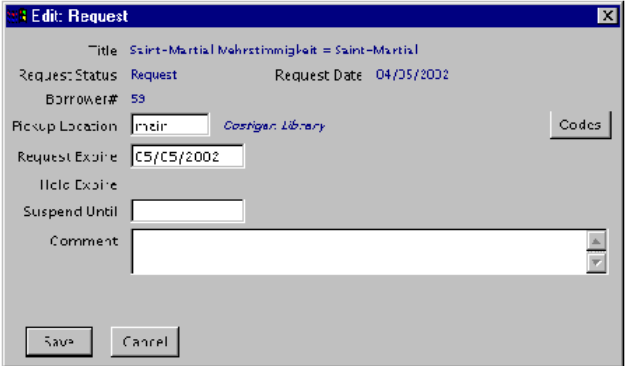
- 1 In the Checkout window, identify the borrower.

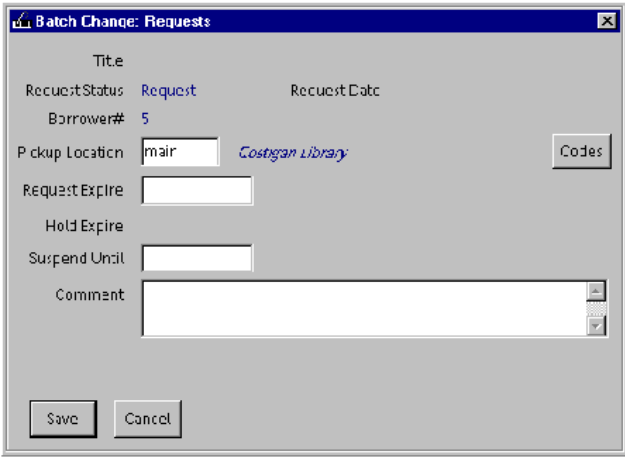
Note: If the borrower has any current blocks, Horizon displays the Current Blocks window. You need to deal with the displayed blocks according to your library’s policy before continuing. (For more information, see [Chapter: Chapter 4, “Blocks” on page 65.](#))

- 2 Choose **Borrower, Requests**.

Horizon displays the Borrower Request List window.

- 3 Do one of these options:

If you want to do this	Do this
Sort the request list	<ol style="list-style-type: none"> 1. Click the Sort button. 2. Select how you want to sort the requests: by processed (title), queue, pickup location, status, request expiration date, or hold expiration date. 3. Select whether to sort in ascending or descending order.
Make changes to one request at a time	<ol style="list-style-type: none"> 1. Highlight the request that you want to edit and click Edit. Horizon displays the Edit Request window: 

If you want to do this	Do this
<p>Make identical changes to several requests at once</p>	<ol style="list-style-type: none"> 1. Highlight the requests that you want to edit. All of the requests that you choose must have the same request status. 2. Click Edit. Horizon displays a Batch Edit Requests message asking if you want to make a batch change to all selected records. 3. Click OK. Horizon displays the Batch Change Requests window: 

4 Do one or more of these tasks:

If you want to do this	Do this
<p>Change the pickup location</p>	<p>Enter the new pickup location code in the Pickup Location field. (Click the Codes button for a list of valid locations.)</p> <p>Note: If the request status is “Hold Shelf,” you cannot edit this field.</p>
<p>Change the expiration date of the request</p>	<p>Enter the new expiration date in the Request Expire field. (This cannot be a date in the past.)</p> <p>Note: If the request status is “Transit Hold” or “Hold Shelf,” you cannot edit this field.</p>
<p>Change the expiration date of the hold</p>	<p>Enter the new expiration date in the Hold Expire field. (This cannot be a date in the past.)</p> <p>Note: If the request has any status other than “Hold Shelf,” you cannot edit this field.</p>

If you want to do this	Do this
Suspend the request	<p>In the Suspend Until field, enter the date upon which the request should be suspended.</p> <p>For example, if the borrower wants to suspend (postpone) the request until after a vacation, enter the date the borrower plans to return from vacation.</p> <p>Note: If the request has any status other than “Requested,” you cannot edit this field.</p>
Reactivate the request before the suspend-until date	Enter the date to reactivate the request in the Suspend Until field. (This cannot be a date in the past.)
Delete, change, or add a comment	Delete unwanted comments, change existing comments, or enter new comments in the Comment field.

- 5 Save your changes.
- 6 Repeat steps 3 through 5 for each request or group of requests that you want to edit.

Filling a Hold Request

When the titles a borrower has requested are checked in, they become available for the next borrower to check out. Requested items that have been checked in are referred to as being on hold. Items can be requested from the local library or from other locations.

This section explains these topics:

- [Filling a Hold Request Locally](#) on page 47
- [Filling a Hold Request with the First Available Item](#) on page 48
- [Filling a Hold Request with an Item from Another Location](#) on page 49
- [Filling a Hold Request Made at Another Location](#) on page 50

Filling a Hold Request Locally

Circulation keeps track of local requests for items. When the item is checked in, Horizon prompts you to prepare the item for the borrower who wants it.

To fill a hold request locally

- 1 Check in the item in **Checkin/Request Processing**. (For instructions, see [Checking In an Item Normally](#) on page 27.)

Horizon displays a message telling you that the item is on hold, how the requestor will be notified, and for whom it is being held:

- 2 Mark the boxes of the items you want to print.

You can print a mailing label or a hold slip or both. If you print a hold slip, you can put the hold slip with the book and put the book on the library’s hold shelf. (For information on displaying the Hold Shelf report, see [Accessing, Saving, and Printing a Report on page 170.](#))

- 3 Click **OK**.

Horizon prints the notices you chose and changes the item status to Being Held.

- 4 Follow your library’s procedures for mailing a notice or otherwise notifying the borrower, and for holding the item for the borrower.

Filling a Hold Request with the First Available Item

You can fill an open hold request with the first available item that is checked in at the selected pickup location—whether from the book drop, technical services, or the delivery van—even if another copy is in transit. When the in-transit (“transit hold”) copy arrives, you can use it to fill the next open hold request at your location. If there is no other open hold request, you can return the transit hold copy to the originating library.



Before you can use this feature, your system administrator must mark the “Allow Transit Holds Override” field in the Location Parameters view. (For instructions, see “Enabling the Transit Holds Override” in the “Setting Up Hold Requests” section of the *Circulation Setup Guide*.)

To fill a hold request with the first available item

- 1 Fill a request with an item that becomes available before the transit hold arrives. (For instructions, see [Filling a Hold Request Locally on page 47.](#))
- 2 Check in the transit hold copy when it arrives.

One of these things happens:

- If there is another borrower in the item request queue, Horizon displays a window telling you who the requester is and lets you choose to print out a mailing label for a notice, a hold slip, or both.
 - If there is no other borrower in the item request queue, Horizon displays a window telling you that the item status has changed to “Transit” and to send it back to the originating library.
- 3 If you are prompted to print a mailing label or hold notice, do these steps:
- a Mark the boxes of the items that you want to print.
 - b Click **OK**.
- Horizon prints the items that you selected and changes the item status of the transit hold to “Being Held.”
- c Follow your library’s procedure for notifying the borrower that their requested item is being held.
 - d Do one of these options:
 - Put the item on the library’s hold shelf together with the hold slip, if you printed one.
 - Follow your library’s procedure for getting the item to the borrower.

Note: If you are prompted to send the item to the originating library, follow your library’s transit procedure for returning the item.

Filling a Hold Request with an Item from Another Location

When you check in an item that was sent from another location to fill a request, you notify Circulation that the item is available to the requester for checkout. Circulation changes the item’s status to Item Being Held and then generates a notice informing the requester that the item is on hold.

To fill a hold request with an item from another location

- 1 Check in the item. (For instructions, see [Checking In an Item Normally](#) on page 27.)

Horizon displays a window telling you who requested the item:

Item on Hold
Notice will be mailed.

Requestor : Spencer, Joe
Phone : 555-3451
Title : The kid's book of questions
/ by Gregory Stock

Comment :

Expires : 05-15-03

Print Label
 Print Hold Slip

OK

- 2 Mark the boxes for the items you want to print.
You can print a mailing label or a hold slip or both.
- 3 Click **OK**.
Horizon prints the notices you selected and changes the item status to Being Held.
- 4 If you printed a hold slip, you can put it with the book and follow your library's procedures for mailing a notice or otherwise notifying the borrower, and for holding the item for the borrower to pick up.

Filling a Hold Request Made at Another Location

When you check in an item that has been requested at another location, Horizon changes the item's status to "In Transit" and tells you where to send it.

When a request is made at another location for an item shelved at your location, the request appears on the Request Pull List at your branch. (Only checked-in items appear on the Request Pull List.) You can use this list to pull the items to be sent to fill the requests at other branches. (For more information, see [Accessing the Request Pull List on page 171](#).)

To fill a hold request made at another location

- 1 Check in the item. (For instructions, see [Checking In an Item Normally on page 27](#).)

This identifies it as available for the request.

Horizon displays a message telling you who is requesting the item:

Item on Hold
Notice will be mailed.

Requester : Spencer, Joe
Phone : 555-3451
Title : The kid's book of questions
/ by Gregory Stock

Comment :

Expires : 05-15-03

Print Label
 Print Hold Slip

- 2 Mark the boxes for the items you want to print.

You can print a mailing label or a hold slip or both.

- 3 Click **OK**.

Horizon prints the notices you chose, changes the item status to “In Transit,” and removes it from the Request Pull List.

- 4 If you printed a hold slip, put the hold slip with the book, and follow your library’s transit procedure for sending the item to the requesting library.

When the item is checked in at the pickup location, Circulation displays a message that the item has been requested and who has requested it.

Viewing Transit from and to Information

Horizon logs the transit from and transit to location information for transit items so that you can locate the items if they do not arrive at their destinations.

To view transit information

- 1 Open the Horizon client and log in.
- 2 Open a Checkout window.
- 3 Select **Item > Find Item**.
- 4 Locate the item for which you want to check the transit status, and then click **Show Detail**.
- 5 On the Bibliographic Detail window, click **Show Copies**.
- 6 Select the copy that you want, and then click **Detail Status**.
- 7 Click **Page Down** to get to page 2 of the table fields.

The Transit Detail information displays.

Recalling an Item to Fill a Request

You can recall items that have been checked out normally but which need to be returned to the library before the due date. When you recall items, Horizon calculates a new due date. You can manually change that due date by entering the new one. If your library guarantees loan periods, the recall due date will calculate the new due date based on that guaranteed loan period. (Your system administrator determines the rules for how recall works. For more information, see “Setting Recall Rules” in the *Circulation Setup Guide*.)

To recall an item

- 1 Open the Checkout window.
- 2 Do one of these options:
 - If the reason for the recall is a borrower request, identify the requesting borrower.
 - If the reason for the recall is something other than a borrower request, minimize the Checkout window.

Important: If a borrower name is displayed in the Checkout window, Horizon uses that borrower information when issuing the recall. If you do not want to use current borrower details for a recall, click **Clear**.

- 3 Start a **New Search**.

To do this, press **F2** or find the process in the **Searching** folder on the navigation bar.

- 4 Search for the item until the title appears in the Bibliographic Detail window.

The item’s status shows at the top of the window.

- 5 Click **Show Copies**.

Horizon displays the title in the Copies window. Highlight the copy to recall.

- 6 Press **F10** or choose **Edit, Send to**.

Horizon displays the Send To dialog box.

- 7 Double-click on **Recall Item** in the list.

Horizon displays the Recall Item window:

The screenshot shows a 'Recall Item' dialog box with the following fields and values:

- Title: ten since the revolution
- Item Barcode: 3C99000340372
- Due Date: 02/24/02
- Reason: Request (with a 'Codes' button)
- Comment: (empty text area)
- Location: main (with a 'Codes' button)
- New Due Date: 02/24/02

Buttons at the bottom: OK, Cancel.

8 Complete the following fields:

Field	Action
Reason	Enter the reason for the recall. (Click Codes for a list of valid options.)
Comment	Enter any additional comments you want printed on the Recall Notice.
Location	Make sure the location is correct. If it is not, enter a new location. (Click Codes for a list of valid locations.) Note: The location should be the item's owning location, so that the checkin clerk knows where to send the item if it is checked in at another location.
New Due Date	Change the due date, if necessary.

9 Click **OK** to complete the process.

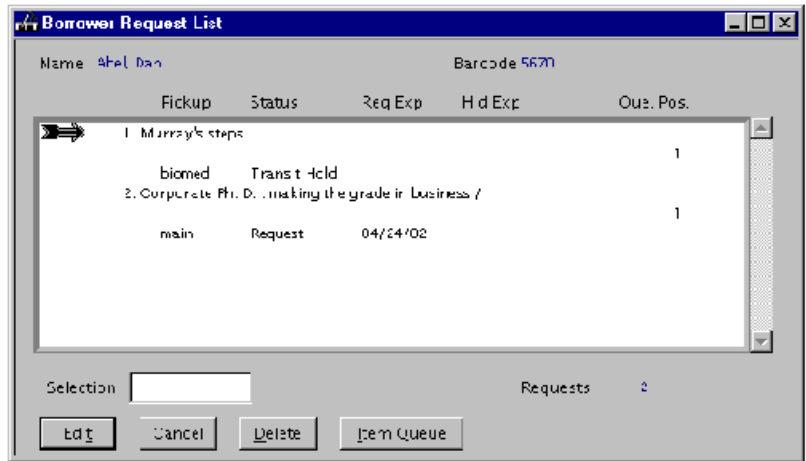
Viewing a Borrower's Hold Requests

You can view a list of all requests made by a single borrower from the Borrower Request List window. You can also delete a borrower's requests from this window.

To view a borrower's hold requests

- 1 In the Checkout window, identify the borrower whose requests you want to view.
- 2 Choose **Borrower, Requests**.

Horizon displays the Borrower Request List window listing the requests made by the borrower:



- 3 If you want to sort the requests, click **Sort**.
 - a Select how you want to sort the requests: by processed (title), queue, pickup location, status, request expiration date, or hold expiration date.
 - b Select whether to sort in ascending or descending order.
- 4 If you want to see a list of other borrowers who have requested this item, click **Item Queue**.

You can reorder the hold queue from this window. (For instructions, see [Reordering the Hold Request Queue on page 56.](#))

Deleting a Hold Request

If a borrower no longer needs a requested item, you can delete the hold request from Checkout. You can also delete a hold request using the Request Pull List. If your system administrator has set it up, Horizon can generate a notice to notify the borrower when a request is deleted.

This section explains these topics:

- [Deleting a Hold Request from Checkout on page 54](#)
- [Deleting a Hold Request Using the Pull List on page 55](#)

Deleting a Hold Request from Checkout

You can delete a borrower's hold request using the Checkout process.

To delete a hold request from Checkout

- 1 In the Checkout window, identify the borrower.
- 2 Choose **Borrower, Requests**.
Horizon displays the Borrower Request List window.
- 3 Highlight the request to delete.

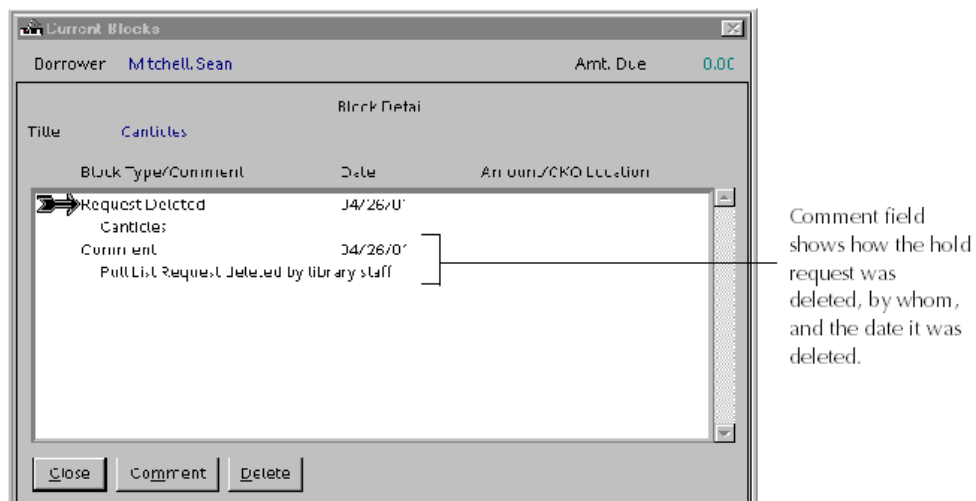
4 Click **Delete**.

Horizon asks you to verify that you want to delete the request.

5 Click **OK** to delete the request and remove the item from the list; otherwise, click **Cancel**.

Deleting a Hold Request Using the Pull List

You can delete single or multiple hold requests using the Pull List. When you do this, the status of the hold request in the borrower's Current Blocks record changes to "Request Deleted." Also, a comment is recorded in the Block Detail with information about how it was canceled and by whom:



For instructions on viewing details about a borrower's blocks, see [Viewing a Borrower's Current Blocks from Checkout](#) on page 78 or [Viewing a Borrower's Current Blocks from Checkin](#) on page 79.

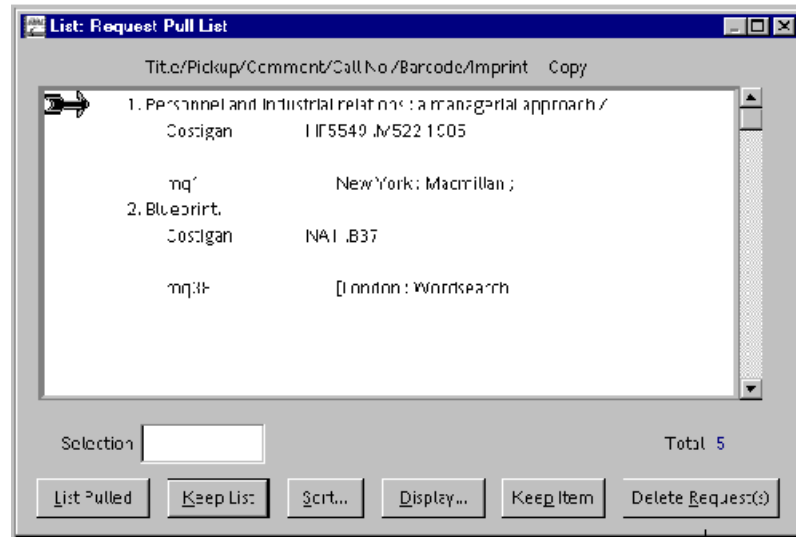
To delete a hold request using the Pull List

1 Start the **Circulation Reports** process.

The default location of this process is the **Circulation** folder on the navigation bar.

2 Choose **Requests, Request Pull List**.

Horizon displays the compiled report in the List Request Pull List window:



Click Delete Request(s) to delete borrower hold requests that you select.

- 3 Highlight the title for which you want to delete the request.
You can choose multiple titles.
- 4 Click **Delete Request(s)**.
Horizon asks you to verify that you want to delete the request.
- 5 Click **OK**.
Horizon deletes the request and removes the item from the list in the List Request Pull List window.
- 6 Choose **File, Exit**.
Horizon asks you to confirm that you want to keep the list.
- 7 Click **Yes** to save the list.
Horizon closes the List Request Pull List window.

Reordering the Hold Request Queue

You can reorder names of borrowers in the hold request queue from Checkout. (For example, you can move the third borrower to first in the queue.) You must know the name of at least one borrower in the hold request queue to reorder the queue from Checkout.

You can also reorder the hold request queue from the Checkin/Request Processing window, but you must check in the item first. If you do not want to check in the item, reorder the request queue in Checkout or in staff searching. (For instructions, see “Requesting Items” in the “Searching Features” section of the “Searching” chapter of the *Horizon Basics Guide*.)



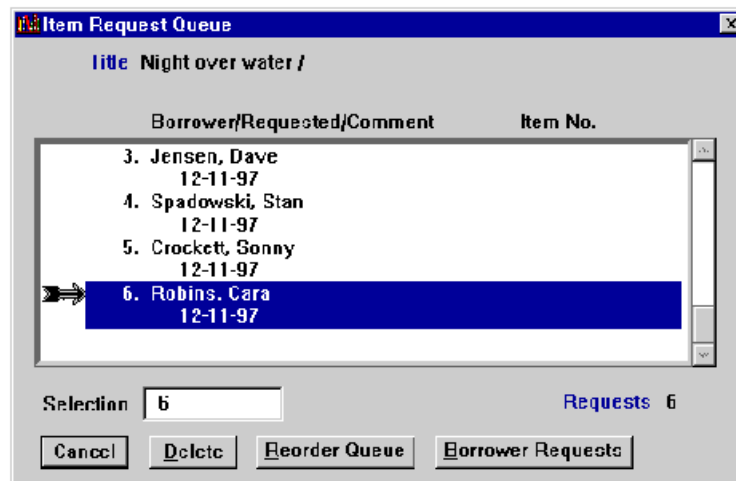
Horizon processes recalls placed on an item first, regardless of the reordering of the queue.

To reorder the hold request queue

- 1 Do one of these options:

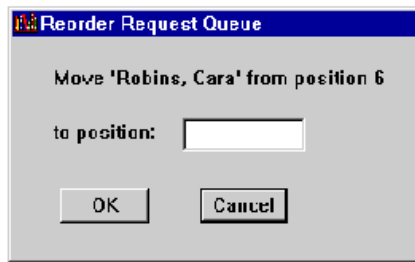
From Checkout	From Checkin
<ol style="list-style-type: none"> 1. Identify one borrower in the request queue. (For instructions, see Checking Out an Item Normally on page 18.) 2. Choose Borrower, Requests. Horizon displays the Borrower Request List window, showing the items the borrower has requested. 3. Select the item whose request queue you want to reorder. 4. Click Item Queue. 	<ol style="list-style-type: none"> 1. Check in the item. (For instructions, see Checking In an Item Normally on page 27.) Horizon tells you the item will be placed on hold for the first person in the request queue. 2. Choose Item, Requests.

Horizon displays the Item Request Queue window for the item:



- 2 Highlight the name of the borrower whose position you want to reorder in the request queue.
- 3 Click **Reorder Queue**.

Horizon displays the Reorder Request Queue window:



- 4 Enter the new position number of the borrower in the request queue.
- 5 Click **OK**.

The name is reordered in the request queue.

Reassigning a Borrower Hold Request

If you want to, you can reassign a hold request that a borrower has made on one title to another title. You may want to do this if you need to delete a bib record but you want to keep the requests that are linked to that record.

When you reassign or transfer hold requests from one title to another, Horizon checks to make sure that there is an item on the destination title that can be requested and checked out by a borrower. Horizon then checks the requests being transferred against each item in the destination title and makes the appropriate transfers.

Effects

- If the destination title has no requests, Horizon transfers the requests.
- If the destination title already has requests on it, Horizon merges the requests that are being transferred into the existing request list by date and time.
- If a borrower has a request on both the title that you are transferring requests to and the destination title, Horizon deletes the duplicate request.

Constraints

If the destination title does not have an item that can be requested, Horizon cannot transfer the request.

This section explains these topics:

- [Setting Up the Transfer Request Queue Display](#) on page 58
- [Transferring a Hold Request from One Title to Another](#) on page 59

Setting Up the Transfer Request Queue Display

To make sure that you transfer requests to and from the correct titles, Horizon lets you choose up to four fields of data to display from the bib record. Horizon also lets you choose the MARC map that you want to use to display the data. Once you choose these settings, Horizon keeps them until you change them.

To set up the Transfer Request Queue display

- 1 Start the **Transfer Request Queue Bib Display** process.

The default location of this process is the **Circulation\Circulation Control Menu** folder on the navigation bar.

Horizon displays the Transfer Request Queue Bib Display window:

Label	Marc Map	Field
Label 1: Title	Marc Map 1: title	Title
Label 2: Author(s)	Marc Map 2: Colau	Authors
Label 3: Publisher	Marc Map 3: pucaion	Publisher Name
Label 4: P.k. Date	Marc Map 4: pu.kdate	Publication Date

(For more information on how to use the grid, see “Working with Grids and Forms” in the “Horizon User Interface” chapter of the *Horizon Basics Guide*.)

- 2 Use the **Label** and **MARC Map** drop-down lists to choose the bib information that you want to use to identify matching bib records.

When you transfer requests, this information displays on the Transfer Request Queue window.

- 3 Click **OK**.

Transferring a Hold Request from One Title to Another

When you transfer requests from one title to another, Horizon lets you load both the title that has the requests you want to transfer and the destination title. Then Horizon displays the information about the titles that you specified when you set up the Transfer Request Queue Bib Display. This lets you verify that Horizon transfers the request to the correct bib record. You can choose whether to transfer item-specific requests.

Effects

Horizon changes item-level requests to bib-level requests.

Constraints

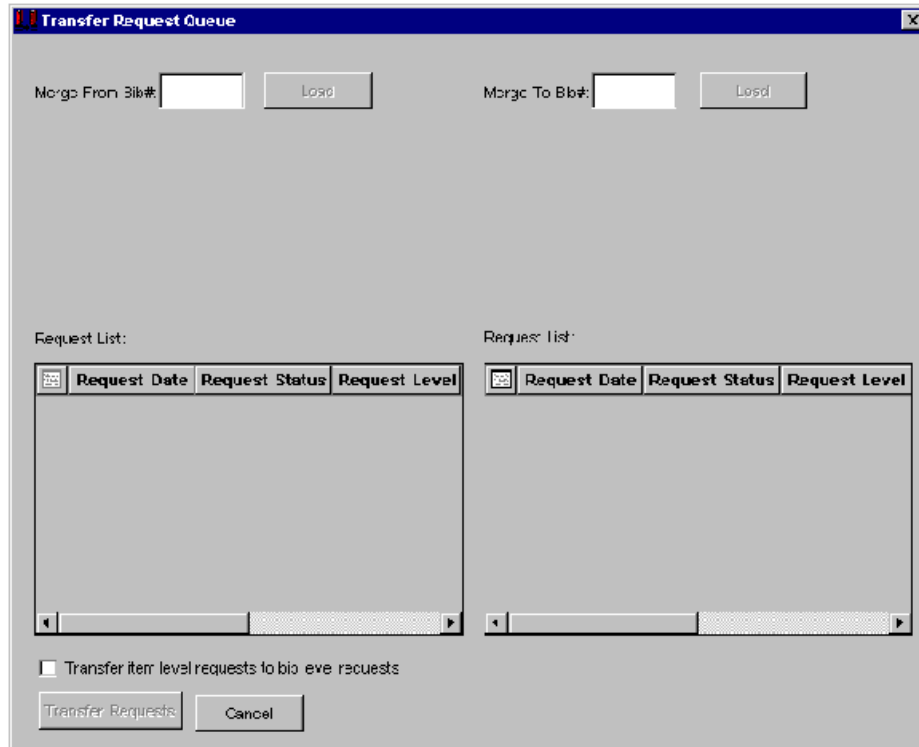
Horizon transfers requests from one title (bib) to another, or from an item level request to a title (bib) request on another title. For transferring an item level request from one title to another, Horizon converts it to a title level request first.

To transfer a hold request from one title to another

- 1 Start the **Transfer Request Queue** process.

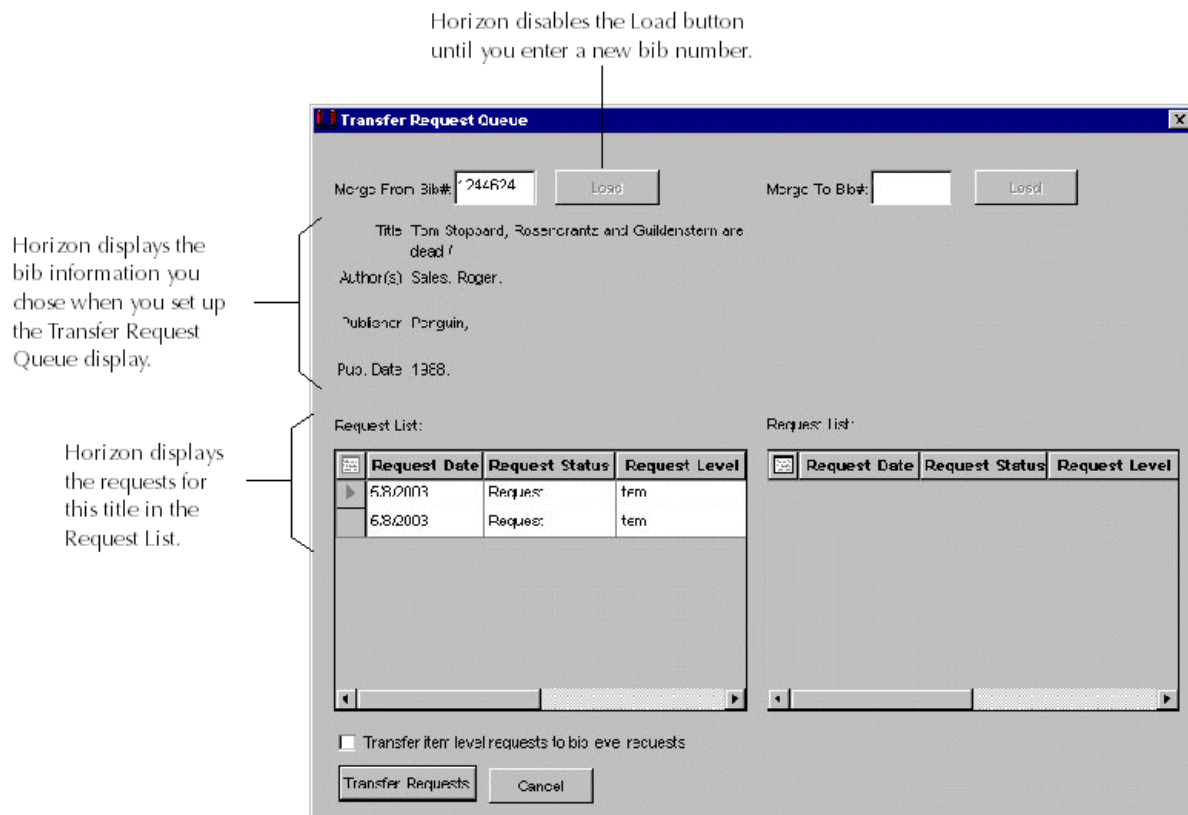
The default location of this process is the **Circulation\Circulation Control Menu** folder on the navigation bar.

Horizon displays the Transfer Request Queue window:



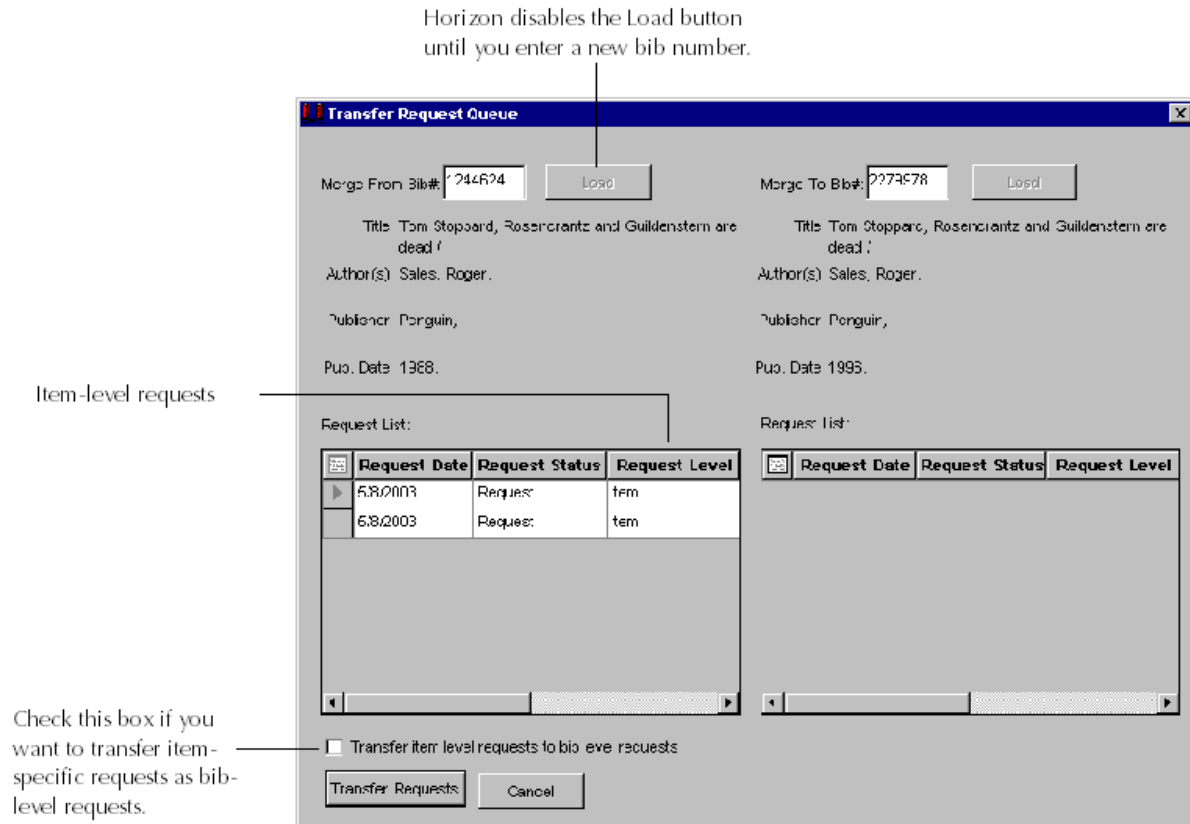
- 2 In the **Merge From Bib#** field, enter the bib number of the title whose requests you want to transfer.
- 3 Click **Load**.

Horizon displays the bib information and the request queue for the bib record number that you entered in the *left* hand Request List window:



- 4 In the **Merge To Bib#** field, enter the bib number of the title to which you want to transfer the requests.
- 5 Click **Load**.

Horizon displays the bib information and the request queue for the bib record number that you entered in the *right* hand Request List window:



6 If you want to transfer item-specific requests and make them bib-level requests, mark the **Transfer item level requests to bib level requests** box.

7 Click **Transfer Requests**.

Horizon transfers the requests and displays them in the destination Request List, sorted by date.

If Horizon could not transfer all of the requests, it displays a message saying, "Transfer is complete. Only requests with a status of "Request" and which can be filled on the destination bib were transferred."

8 Repeat steps 2 through 7 if you want to transfer more requests.

9 Click **Cancel** to close the Transfer Request Queue process.

Overriding a Hold

Once a requested item is on your hold shelf, you can override the hold for the original borrower and check out the item to another borrower.

When you override a borrower's hold and check out the item to another borrower, Day End places a "Hold Canceled by Library" block or a "Hold Canceled by Library and Reinserted in Queue" block on the requester's record. (For more information, see [About Blocks on page 65](#).) If you reinsert the original borrower's hold request, it appears at the top of the queue.

To override a hold

- 1 In the Checkout window, identify the borrower.
- 2 Identify the item.

Horizon displays the name of the borrower who has requested the item.



- 3 Click **Yes** to override the hold and check out the item; otherwise, click **No**.

Chapter 4: Blocks

This chapter contains information on circulation blocks, including a brief description of each block, instructions for placing and resolving blocks, and information on handling financial transactions.

This chapter contains these topics:

- [About Blocks](#) on page 65
- [Understanding Types of Blocks](#) on page 65
- [Manually Placing a Block](#) on page 74
- [Viewing Block Information](#) on page 77
- [Resolving Blocks](#) on page 83
- [Managing Fees, Bills, and Payments](#) on page 85

About Blocks

A block is a flag that stops you from checking out items to a borrower. Some blocks are assigned to borrowers automatically when the borrowers violate library policy, such as when they have overdue books or unpaid fines. Other blocks are assigned automatically when borrowers have books on hold waiting to be picked up or when refunds are due them. You can also manually assign blocks. (For example, you can assign a miscellaneous charge or a message saying the borrower's wallet has been found.) Horizon keeps a history of a patron's blocks that you can view.

Some blocks are deleted automatically by Horizon when they are resolved. Others must be deleted manually after they are resolved. Resolving blocks involves paying fines, fees, and extending refunds. Because Horizon keeps track of money owed, collected, and paid, you must do certain tasks to keep the financial books accurate.

Understanding Types of Blocks

Borrower blocks are flags that interrupt the checkout process to inform you of a borrower delinquency, an unresolved status for an item, or a message for the borrower. (For example, if a borrower owes a late fee on returned items, a block appears during checkout telling you about it so you can work with the borrower to resolve it.)

There are two general categories of blocks:

- **System-generated blocks.** Horizon automatically places these blocks on a borrower's record when borrower type privileges or circulation limits are exceeded. These blocks include overdues, fines, exceeded maximums, and hold notification.

- **Library-defined blocks.** You place these blocks manually on a borrower's record. These blocks may include messages to borrowers or deal with fees (other than fines) that are owed.

This section explains these topics:

- [System-Generated Blocks on page 66](#)
- [Library-Defined Blocks on page 74](#)

System-Generated Blocks

Horizon comes with a set of predefined blocks. You cannot delete these system-generated blocks, but you can edit some of the parameters. Parameters you can edit include time periods, actions taken, and messages. (For instructions, see “Setting Up or Editing a Block Type” in the “Setting Up Blocks” section of the *Circulation Setup Guide*.)

This table describes the system-generated blocks that come installed in Horizon:

Block Name	Block Code	Block Function
Automatic Bill Sent	abs	This block triggers a billing statement. When the statement is generated, Horizon attaches an Automatic Bill Sent block to each of the fine or lost blocks that have amounts included on the billing notice.
Address Correction Requested	acr	If you are aware that a borrower's address has changed, you can place this block on the borrower's record. The next time the borrower checks out an item, you can update the borrower's record.
Adjustment Credit	adjcr	When a staff member decreases the amount a borrower owes on an existing fine or fee, Horizon attaches an Adjustment Credit block to the borrower's record. This block tracks the date and the amount adjusted.
Adjustment Debit	adjdbt	When a staff member increases the amount a borrower owes on an existing fine or fee, Horizon attaches an Adjustment Debit block to the borrower's record. This block tracks the date and amount adjusted.
Balancing Entry	balance	Horizon places this block as a notation appended to the original fine block.

Block Name	Block Code	Block Function
Booking Cancelled: By Borrower, Expired, By Library, By Suspension, Tardy	babr, bce, bcl, bcsp bct	Each of these blocks is attached to borrowers' records when their bookings are cancelled. Each block identifies the reason the booking was cancelled: <ul style="list-style-type: none"> • By Borrower. The borrower no longer needs the item and has cancelled the booking. • Expired. The booking period passed without the borrower checking out the booked item. • By Library. A staff member cancelled the booking. • By Suspension. The borrower is no longer an active user of the system. • Tardy. The holding period for the booking period passed and the item was not picked up. The item was checked out to someone else.
Billing Notice	bn	Horizon places this block when Day End is run, triggering a billing statement because the borrower has new fines that exceed a library-determined limit. (For information on setting a fine limit, see your system administrator.)
Rental Fee	ckofee	This block is not used by all libraries. If your library has set up rental fees, this block is automatically set to charge a fee for each item (according to ITYPE and BTYPE) a patron checks out. (For more information, see Assessing Fees and Fines on page 86.)
Claimed Returned	cr	You can manually change the Overdue block to a Claimed Returned block when a borrower claims that an overdue item has been returned. The Claimed Returned block does not exempt the borrower from responsibility for the item, but it does alert the library to take the necessary steps to check if the book is in the library. Note: When you use this block, you should access it directly from the CKO menu. (For more information, see Placing a Claimed Returned or Lost Item Block on page 76.)
Credit	credit	This block is placed when an amount is credited to the borrower's account.

Block Name	Block Code	Block Function
Damaged	damage	When a borrower returns an item in a damaged state, you can manually attach this block to the borrower's record. If you want a fine levied for repairs, mark the "Payment" Amount Type option. For more information, see "Setting Up or Editing a Block Type" in the "Setting Up Blocks" section of the <i>Circulation Setup Guide</i> .
Debt Collection	dc	Horizon places this block when a borrower's name has been sent to a collection agency.
Exempt from Debt Collection	edc	Horizon places this block if a borrower whose name ordinarily would be sent to a collection agency will not be sent.
Force to Debt Collection	fdc	Horizon places this block when a patron's name is forced to a collection agency.
Fees	fee	This block is not used by all libraries. It is usually set to charge a card or membership fee. It can also be used to note miscellaneous fees, such as copy machine use. Note: This block should not be used to enter overdue fines.
Final Overdue Notice	final	After other overdue notices have been sent and the item still has not been returned, Horizon applies this block. After the final notice is sent and after a library-specified interval passes, Horizon replaces the Overdue block with a Lost block. If the lost item is checked in, the borrower will still be charged overdue fees.
Final Recall Notice	finalr	Similar to the final overdue notice explained in the previous block, this block is associated with an overdue recalled item.
Fine	fine	When an overdue item is checked in, the Overdue Still Out block is replaced by a Fine block. The Fine block checks the due date and checkin date, accounts for any grace period, and computes the fine according to the ITYPE and BTYPE. (For more information on setting IYPES, BYPES, and grace periods, check with your system administrator.) Your library can create additional fine blocks that are attached manually. (For more information, see Assessing Fees and Fines on page 86 .)

Block Name	Block Code	Block Function
Hold Cancelled: By Borrower, By Library	hcb hcl	<ul style="list-style-type: none"> • By Borrower. If a borrower cancels a hold, Horizon places this type of block on the borrower's record so there is a record of why and when the block was cancelled. • By Library. If a staff member cancels a hold placed by a borrower, Horizon places this type of block on the borrower's record so there is a record of why and when the block was cancelled. (For more information, see Overriding a Hold on page 62.)
Hold Cancelled and Reinserted in Queue	hclr	<p>When a staff member checks out an item on hold to a different borrower, Horizon allows the option of reinserting the original request in the request queue. If a staff member chooses to reinsert the request, Horizon generates this block and places it on the borrower record of the original borrower. (For more information, see Overriding a Hold on page 62.)</p>
Hold Expired	he	<p>If an item remains on hold for a specified amount of time and is not picked up by the requestor, then Horizon automatically cancels the hold. The time required between the time the item is checked in and the time the hold is cancelled is determined by library policy and set by your system administrator.</p>
Hold Notification: Deliver, From Closed Stack, Mail, Phone,	hncko, hnlsa, hnmail, hnphone,	<ul style="list-style-type: none"> • Deliver. Horizon places this block on a borrower's record when a hold notification for delivery has been generated. The block keeps track of what action has been taken regarding the hold. • From Closed Stack. Horizon places this block when a notice has been generated to tell a borrower that items from closed stacks are ready for the borrower to use. • Mail. Horizon places this block when a hold notification for mailing has been generated. The block keeps track of what action has been taken regarding the hold. • Phone. Horizon places this block when a notice has been generated to perform a hold notification by phone. The block keeps track of what action has been taken regarding the hold.
Invoice	in	<p>Your library has the option to notify borrowers of fines owed with either a billing notice or an invoice. If an invoice is generated for a borrower, this block is attached to the borrower's record automatically.</p>

Block Name	Block Code	Block Function
Checkin Location, Checkin Date, Checkout Date, Due Date, Renewal Date,	infocil, infocki, infocko, infodue, inforen	Horizon creates these blocks to record information about transactions: checkin location, checkin or checkout dates, due date or renewal date.
Lost	l	<p>This type of block is similar to a Claimed Returned block, except that the borrower claims to have lost the item. If the item is not found within a specified amount of time (determined by library policy), then a replacement item may be acquired and the borrower assessed a fine to cover the cost of the replacement item. You can manually place this block on a borrower's record from the CKO menu. (For more information, see Placing a Claimed Returned or Lost Item Block on page 76.)</p> <p>A Lost block is automatically placed on a borrower's record when a final overdue notice is sent to a borrower.</p>
Found	lf	When a lost item is checked in, Horizon sets a Found block on the borrower's record. If a fine has been paid for the lost item, Horizon also generates a Refund of Payment block for the borrower.
Lost Processing Fee	LostPro	This block is placed when a lost item processing fee, determined by library policy, is charged to a borrower.
Lost Recall	lr	This block is placed when a borrower had an item that was recalled, but the item was never returned and is now presumed lost.
Message to Borrower	msg	If a borrower has a situation that the regular system blocks do not fit, you can place your own message block on the borrower's record. Messages describe or clarify unusual circumstances and exceptions to library policies.
Comment	note	Similar to Message to Borrower, this block allows you to make a comment that is not specifically directed to the borrower.

Block Name	Block Code	Block Function
Notices, Overdue: First, Second, Third, Fourth, Fifth, Sixth	notice1, notice2, notice3 notice4 notice5 notice6	These blocks are placed when notices are generated for overdue items rather than for unpaid fines. A library can set Horizon to generate two or more different overdue notices if the item is not returned. After the notices have been sent and the overdue items have not been returned, Horizon generates a final overdue notice and places a Final Overdue Notice block on the borrower's record. (For more information, see block code " final " in this table.)
Notices, Recall: First, Second, Third, Fourth, Fifth, Sixth	noticr1, noticr2, noticr3 noticr4 noticr5 noticr6	Similar to overdue notices explained in the previous block, these blocks are associated with overdue recalled items.
Never Send Notices	nnsn	This type of block is usually placed manually when there is a borrower who should never be sent a notice. This block overrides the system-generated notifications. (For more information, see Manually Placing a Block on page 74.)
Overdue Still Out	od	Horizon automatically generates this block when an item has not been checked in by its due date.
Recalled and Overdue Still Out	odr	Horizon automatically generates this block when an item that has been recalled has not been checked in by its due date.
Fine Payment	payment	When a borrower pays a fine, Circulation deducts the amount paid from the total amount owed. Then it attaches a Payment for Fine block to the original block and moves the whole block to the History Blocks list. (For more information, see Transacting Payments, Waivers, and Refunds on page 91.) To see the Fine Payment block, display the borrower's block history, then view the Block Detail window for the appropriate block. (For more information, see Viewing a Borrower's Block History on page 79 and Viewing Block Details on page 81.)

Block Name	Block Code	Block Function
Phone Correction Requested	pcr	If you are aware that a borrower's telephone number has changed, you can place this block on the borrower's record. The next time the borrower checks out an item, you can update the borrower's record.
Request Deleted	rd	Horizon places this type of block when a bib record for a requested title has been deleted. In addition, if the request has been placed on a specific item, rather than any item with that title, then this hold will be placed if the item record is deleted.
Request Expired	re	If an item remains on request for a certain amount of time, Horizon cancels the request. The amount of time between the request and the cancellation is determined by library policy and set by your system administrator.
Item is Recalled Before Due Date	recall	When you recall an item, a Recall block is placed on the record of the borrower who currently has the item checked out. This block changes the item's due date and triggers a recall notice. The block will be resolved when the item is checked in.
Refund of Payment	refund	When you refund a payment to a borrower, Horizon attaches this block to the original block to keep track of the date and the amount of the transaction. Horizon moves the whole block to the borrower's block history list. (For more information, see Transacting Payments, Waivers, and Refunds on page 91 .) Your library can create additional refund blocks that are attached manually.
Reminder Invoice	ri	Reminder invoices combine information from all invoices for a borrower. The number of days Horizon will delay sending out a Reminder Invoice after a regular invoice remains unpaid is determined by your system administrator. (For more information, see Reminder Notices on page 103 .)
Requested Item Lost	rl	When Horizon marks a requested item as Lost, Horizon adds a Request Item Lost block to the requestor's current blocks. Horizon adds this block only if the request is an item-specific request. The block does not apply to title-level requests.

Block Name	Block Code	Block Function
Reminder Billing Notice	rn	<p>Reminder notices can be sent out in addition to the regular overdue and billing notices. Your system administrator sets Horizon to generate reminders for borrowers who have more than a certain number of overdue items or who have a fine larger than a set limit.</p> <p>Since these reminders are sent in addition to the normal and overdue billing notices, they only need to be generated for borrowers who have many overdue items or large outstanding fines. Unlike Overdue and Billing notices, the reminders are not generated by Day End. Reminders are generated in Circulation Reports. (For more information, see Reminder Notices on page 103 and Printing or E-mailing Notices, Invoices, and Reminders on page 109.)</p>
Renewal Fee	rnwfee	<p>This block is not used by all libraries. If your library has set up renewal fees, this block is automatically set to charge a fee for each item (according to ITYPE and BTYPE) a patron renews. (For more information, see Assessing Fees and Fines on page 86.)</p>
Suspension until ...	suspend	<p>Your library has the option to suspend a borrower's circulation privileges for a number of days until the library's concerns about this borrower's block issues are resolved. Attach this block to suspend a borrower's privileges, and each time the borrower attempts to check out an item, this block appears. This block can be attached to a borrower's record in addition to fines. The number of days privileges are suspended is specified in the circulation privileges view. (For more information, check with your system administrator.)</p>
Waiver of Fine	waiver	<p>When you waive a fine, Horizon deducts the amount waived from the total amount owed and then attaches a Waiver of Fine block to the original block and moves the whole block to the History Blocks list. (For more information about waiving fines, see Transacting Payments, Waivers, and Refunds on page 91.)</p> <p>To view a specific Waive of Fine block, display the borrower's block history, then view the Block Detail window for the appropriate block. (For more information, see Viewing a Borrower's Block History on page 79 and Viewing Block Details on page 81.)</p>

Each borrower type is allowed a maximum number of these kinds of blocks:

- Unpaid fines
- Overdues
- Total items out
- Requests
- Days items can remain overdue
- Days fines can remain unpaid
- Days recalled items can remain overdue

These limitations are established as part of the library policy and are set up by your system administrator. When you attempt to check out an item to a borrower who has exceeded the maximum, Horizon displays the Maximum Exceeded window, listing which maximums have been exceeded. You can cancel the checkout, override the limits (if you are authorized), or resolve the problems before continuing with checkout.



The total items out configuration (Max. Number of Items Out circulation parameter code) is set independent of the Global maximum of checkouts circulation parameter that is set at the system level. If a checkout is blocked because of the global maximum, the value **global** displays next to the btype in the Maximum Exceeded window; if a checkout is blocked because of a Max. Number of Items Out value, the value **biblio** displays.

Library-Defined Blocks

Your library may also create other blocks to prevent circulation procedures. The most common library-defined blocks are cash transaction blocks. Such blocks might include different payment methods, such as credit card or check, and different reasons for refunds or waivers. This chapter includes explanations of how to add, edit, and resolve cash transaction blocks. Any other specific types of blocks may vary from library to library and are created by your system administrator.

With the exception of cash transaction blocks, this guide does not attempt to address the various types of library-defined blocks. These blocks may range from notes and messages to interlibrary loan blocks, and differ from library to library. However, once they are defined, the basics of viewing, resolving, adding, and editing library-defined blocks are very similar to the basics for system-defined blocks.

Manually Placing a Block

Although Horizon automatically places most blocks, you may need to manually place blocks on a borrower's record.

This section explains these topics:

- [Placing a Note Block on page 75](#)
- [Placing a Fee Block on page 75](#)
- [Placing a Claimed Returned or Lost Item Block on page 76](#)
- [Adding a Comment to a Block on page 76](#)

Placing a Note Block

If a borrower has a situation that does not fit with the system-defined blocks, you can manually place a note block on his or her record. Note blocks may be comments or messages to borrowers such as Address Correction Requested or Never Send Notices. Note blocks usually do not involve lost privileges, so you can usually delete the block once the borrower has read the message or comment.

To place a note block

- 1 In the Checkout window, identify the borrower.
- 2 Choose **Blocks, Add Note**.
- 3 If Horizon displays the Edit Current Blocks window, go to step 6.
- 4 If Horizon displays the Code Look-up Block Types window, double-click on the note block type you want to add.

Horizon displays the Edit Current Blocks window.

- 5 Mark the appropriate **Action** button.

This determines what type of action Circulation takes with the block. There are three action types:

- **None.** Horizon takes no action on the block.
- **Print.** Day End prints a notice or creates an e-mail message about the block to send to the borrower.
- **Review.** Horizon adds the block to the Notice Review list. This lets the circulation staff review the matter to see if any other action is needed.

For more information, see [Editing the Action Setting for Notices in the Notices for Review List on page 108](#).

- 6 If you want to, enter a comment about the note block in the **Comment** field.
- 7 Click **OK**.

Horizon closes the Edit Current Blocks window and displays the Current Blocks window for the borrower. The newly-added note block is on the list.

Placing a Fee Block

Your system administrator can create fee blocks for fees such as interlibrary loans, photocopy fees, and library card issuance fees. You can manually add these fees to a borrower's current blocks. (For more information, see [Horizon Adding a Library-Defined Fee on page 87](#).)

Placing a Claimed Returned or Lost Item Block

If a borrower reports that an overdue item has already been returned or has been lost, you can change the Overdue block to a Claimed Returned or Lost block, respectively.



Your system administrator can set the Claimed Returned and Lost statuses to change to a “Missing” status after a specified number of days. (For instructions, see “Setting a Status to Change Automatically” in the “Preparing Horizon to Work with Item Records” section of the *Circulation Setup Guide*.)

To place a claimed returned or lost item block

1 In the Checkout window, identify the borrower.

2 Click **All Items Out**.

Horizon lists all items currently checked out to the borrower.

3 Highlight the overdue or lost title.

4 Choose **CKO**, **Claim Returned** or **CKO**, **Lost**.

Horizon assigns a “Claimed Returned” or “Lost” status to the item, depending on the one you chose.

Adding a Comment to a Block

If an unusual situation arises with a borrower’s block and you need to note it in Circulation, you can add a comment to the block.

To add a comment to a block

1 In the Checkout window, identify the borrower.

Since the borrower has one or more current blocks (including the one you want to add a comment to), Horizon displays the Current Blocks window.

2 Highlight the block to which you want to add a comment.

3 Click **Detail**.

Horizon displays the Block Detail window for that block.

4 Click **Comment**.

Horizon displays the Edit Block Detail window.

5 Enter your note in the **Comment** field.

You can enter a maximum of 80 characters.

6 Mark the appropriate **Action** button.

7 Click **Close**.

Horizon returns to the Block Detail window and displays the new comment.

Viewing Block Information

If you need to view general information about a borrower's blocks, you can display current as well as resolved blocks. You can view this information after it has been sorted by block type or item barcode and also view details about the blocks, including whether any notices or reminders have been sent.



Your system administrator sets up the number of days that Horizon displays an item with a Claimed Returned, Missing, or Lost status in your PAC before Horizon automatically changes the setting to display the item in Staff PAC only. (For instructions, see “Automatically Suppressing Items from Public Searches” in the “Preparing Horizon to Work with Item Records” section of the *Circulation Setup Guide*.)

This section explains these topics:

- [Viewing a Borrower's Current Blocks](#) on page 77
- [Viewing a Borrower's Block History](#) on page 79
- [Viewing Block Information by Item Barcode](#) on page 80
- [Viewing Block Details](#) on page 81
- [Working with Display Options for Viewing Block Information](#) on page 82

Viewing a Borrower's Current Blocks

You can view information about a borrower's current blocks in the Current Blocks window, either during checkout or checkin. These tables describe the information and actions that the Current Blocks window makes available to you.

The display fields in the Current Blocks window provide this information:

Field	Description
Borrower	This displays the name of the borrower whose record you are viewing.
Overdues	This displays the number of overdue items the borrower currently has checked out.
Amt. Due	This displays the total amount of fines the borrower has accrued.
Overdue Accrued Amt.	This is the amount the borrower would owe if all overdue items were checked in today. This potential amount is not included in the total amount owed, since the items are not yet returned. However, once you check in an overdue item, the overdue block is removed and the overdue amount for that item accrues. The amount is then included in the total amount owed.

Field	Description
Blocks	This displays the total number of blocks against the borrower's record.
List window	This display includes the block type; the date, time, location, and amount of each block; item-related information; and any special messages.

Clicking these buttons on the Current Blocks window activates these options:

Button	Description
Detail	This displays details of a single block that you highlight in the list box.
CKO	This overrides the blocks and displays the borrower in the Checkout window for checkout procedures.
No CKO	This closes the Current Blocks window.
Payment	This lets you transact a payment for the fine if the borrower owes a fine.
History	This displays the History Blocks window for the borrower, where you can view or edit comments about past blocks.
Change Amount	This displays a window where you can change the amount owed for a selected fine or fee block.

This section explains these topics:

- [Viewing a Borrower's Current Blocks from Checkout on page 78](#)
- [Viewing a Borrower's Current Blocks from Checkin on page 79](#)

Viewing a Borrower's Current Blocks from Checkout

The most common time to view the Current Blocks window is when you are checking out an item for a borrower. There are two ways the window is viewed during checkout procedures:

- **Automatically.** If a borrower has blocks when you enter his or her ID in the Checkout window, Circulation makes an audible signal and displays the Current Blocks window.
- **Manually.** If you have already identified a borrower who has blocks and have overridden the Current Blocks window when it is displayed, you can click Blocks at the bottom of the Checkout window to redisplay the current blocks.

Viewing a Borrower's Current Blocks from Checkin

Unlike checking out an item, when you check in an item, Circulation does not automatically display a list of the borrower's outstanding blocks. This is because no action is usually required on your part at the checkin time.

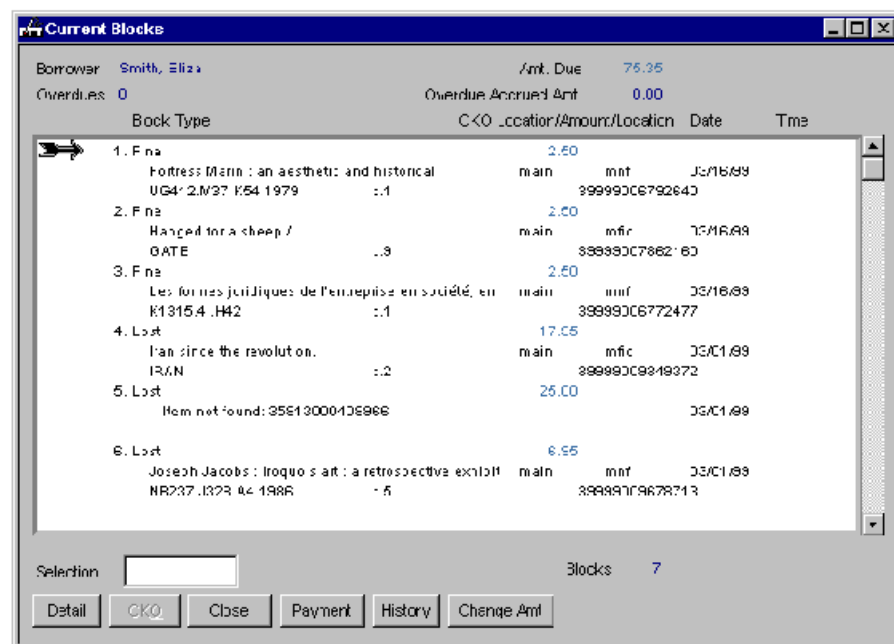
To view a borrower's current blocks from Checkin

- 1 Open the Checkin/Request Processing window.
- 2 Check in an item from the borrower whose blocks you want to view. (For instructions, see [Checking In an Item on page 23.](#))

Horizon checks in the item and enables the Show Blocks button at the bottom of the window.

- 3 Click **Show Blocks**.

Horizon displays the Current Blocks window for the borrower who had the item checked out:



Viewing a Borrower's Block History

You can view information about a borrower's resolved blocks in the History Blocks window.

The History Blocks window contains this information:

- The name of the borrower.
- A list box of all blocks for that borrower and the dates they were resolved.
- The total number of blocks that borrower has accumulated.

You can access the History Blocks window from the Current Blocks window or from the Borrower menu.

To view a borrower's block history from the Current Blocks window

- 1 Display the Current Blocks window. (For instructions, see [Viewing a Borrower's Current Blocks from Checkout on page 78](#) or [Viewing a Borrower's Current Blocks from Checkin on page 79](#).)
- 2 Click **History**.
Horizon displays the History Blocks window.
- 3 If you want to display details about a block, highlight the block and click **Detail**.

To view a borrower's block history from the Borrower menu

- 1 In the Checkout window, identify the borrower.
- 2 Choose **Borrower, History Blocks**.
Horizon displays the History Blocks window.
- 3 If you want to display details about a block, highlight the block and click **Detail**.

Viewing Block Information by Item Barcode

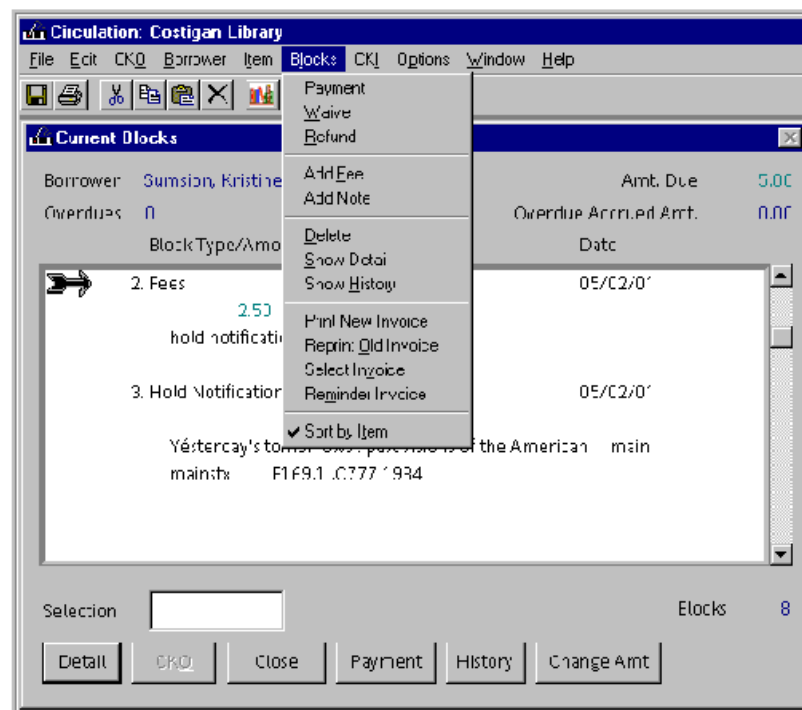
The default sorting method for viewing block information organizes information first by block type and then by date of block. (For example, all overdue notice blocks are grouped together by date, all fine blocks are grouped together by date, all hold blocks are grouped together by date, and so forth.) This grouping gives you an overview of blocks by type of block.

If you choose the sort-by-item option, Horizon organizes information first by item barcode and then by date. (For example, overdue notices, fines, and a fine payment on a single item are grouped together, even though they are different block types.) This grouping gives you an overview of all block actions against the item.

You can view the block information primarily by item barcode in Current Blocks or History Blocks. In Current Blocks, item groups sort secondarily by the date of the block. In History Blocks, item groups sort secondarily by the date of the *resolution* of the block.

To view block information by item barcode

- 1 Open the Current Blocks or History Blocks window. (For instructions, see [Viewing a Borrower's Current Blocks from Checkout on page 78](#), [Viewing a Borrower's Current Blocks from Checkin on page 79](#), or [Viewing a Borrower's Block History on page 79](#).)
- 2 Choose **Blocks, Sort by Item**.



Horizon sorts the information and displays it in order by item barcode.

Note: Horizon sorts information by item barcode until you deselect the Sort by Item menu option or until you close Circulation.

Viewing Block Details

The Block Detail window displays specific information about a block, including any comments entered about the block and any notices and reminders that have been sent.

The window also displays this information:

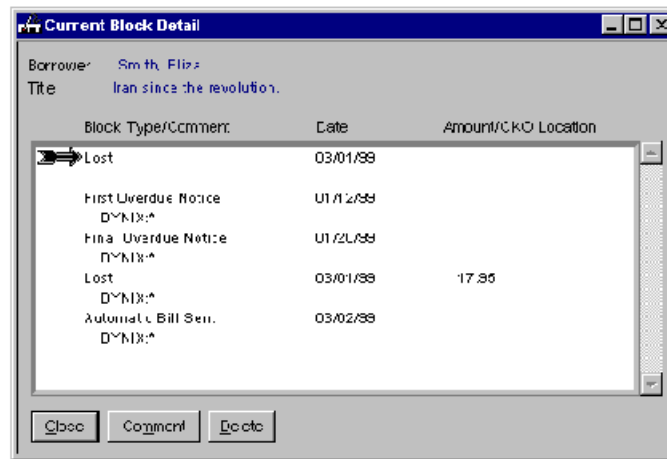
- Block type
- Date a hold expires for an item being held
- Item for which the block was placed
- Date the item was checked out
- Date the item was due
- Date the item was actually returned
- Date the block was issued
- Payment amount still owing (if any)

The Block Detail window can be opened from the Current Blocks window or the History Blocks window.

To view block details

- 1 Display the Current Blocks or History Blocks window. (For instructions, see [Viewing a Borrower's Current Blocks from Checkout on page 78](#), [Viewing a Borrower's Current Blocks from Checkin on page 79](#), or [Viewing a Borrower's Block History on page 79](#).)
- 2 Highlight the block with the detail you want to view.
- 3 Click **Detail**.

Horizon displays the Current Block Detail window:



From this window you can place a comment about the block or delete the block. (For more information, see [Adding a Comment to a Block on page 76](#) and [Deleting a Block Manually on page 85](#). For instructions on how to make changes to the hold expiration date, see [Editing a Hold Request on page 44](#).)

Working with Display Options for Viewing Block Information

Horizon provides several display options for viewing block information. For example, you can choose the order in which you want blocks to display on any blocks views. You can sort blocks by date or by item. If a borrower has incurred more than one block for a single item, you can display all of the blocks for the item under one summary block. However, regardless of which sort option you choose, Horizon always displays non-item blocks first.

This section contains these topics:

- [Grouping Multiple Blocks for a Single Item on page 83](#)
- [Sorting Blocks on page 83](#)
- [Displaying Non-Item Blocks First on page 83](#)

Grouping Multiple Blocks for a Single Item

By default, all blocks for a single item are displayed independently. If you want, you can choose to group multiple blocks for a single item together under a summary block.

To group and display multiple blocks for a single item

- Choose **Blocks, Group All Related**.

Horizon displays a check mark next to the option and redisplay the blocks in related groups.

Sorting Blocks

By default, Horizon sorts blocks by the date the block was incurred, starting with the most recent date. If you sort by item, fines are sorted by fine amount, with the largest fine being listed first.

To sort blocks

- Do one of these options:
 - To sort blocks by date, choose **Blocks, Sort by Date**.
 - To sort blocks by item, choose **Blocks, Sort by Item**.

Horizon displays a check mark next to the option.

Displaying Non-Item Blocks First

Horizon displays any special message or non-item-related blocks at the top of the Current Blocks or History Blocks windows. Horizon lists the system non-item blocks first (such as the Address Correction block), followed by any non-item blocks that your library has defined. (Your system administrator sets up sort order priority. For more information, see “Setting Up or Editing a Block Type” in the “Setting Up Blocks” section of the *Circulation Setup Guide*.)

If you have chosen a sort option from the Blocks drop-down menu, Horizon still displays non-item blocks first regardless of which sort option you chose. Following the non-item blocks, Horizon displays any item blocks according to the sort option that you chose.

Resolving Blocks

Circulation blocks are resolved either automatically by Horizon, or manually by a staff member.

This section contains these topics:

- [Resolving Blocks Automatically on page 84](#)
- [Resolving Blocks Manually on page 84](#)

Resolving Blocks Automatically

Most blocks are resolved automatically by Horizon. (For example, when a person pays a fine, Horizon removes the fines block.)

This table explains how to resolve most system-assigned blocks:

To resolve this block	Do this
Overdue	Check in the item.
Fine	<ol style="list-style-type: none"> 1. Receive payment or waive the fine. 2. Mark the fine as paid. (For instructions, see Transacting a Payment or Waiver Using Cash or a Check on page 92.)
Rental Fee	<ol style="list-style-type: none"> 1. Receive payment or waive the fine. 2. Mark the fine as paid. (For instructions, see Transacting a Payment or Waiver Using Cash or a Check on page 92.)
Renewal Fee	<ol style="list-style-type: none"> 1. Receive payment or waive the fine. 2. Mark the fine as paid. (For instructions, see Transacting a Payment or Waiver Using Cash or a Check on page 92.)
Lost	<ol style="list-style-type: none"> 1. Receive payment or change the item to “Claimed Returned.” 2. Mark the fee as paid.
Missing	Check in the item.
Recalled	Check in the item.

Resolving Blocks Manually

You must resolve some blocks manually, without waiting for Horizon to deal with them. You can also manually control some of the blocks that are usually resolved automatically.

This section explains these topics:

- [Exempting a Borrower from Fines Calculation](#) on page 84
- [Deleting a Block Manually](#) on page 85

Exempting a Borrower from Fines Calculation

You can exempt a borrower from fines calculation when he or she checks in overdue items. If you do not exempt the borrower at this time, fines accrue and then must be waived. (For more information on waiving a fine, see [Transacting a Payment or Waiver Using Cash or a Check](#) on page 92.)

To exempt a borrower from fines calculation

- 1 Open the Checkin/Request Processing window.

- 2 Mark the **Exempt Fines** button.

All items checked in while this button is marked are exempt from fines calculation.

- 3 Check in the items that should be exempted from fines. (For more information, see [Checking In an Item on page 23.](#))
- 4 When you finish checking in exempted items, deselect the Exempt Fines button.



If you do not deselect the Exempt Fines button, all items you check in will be exempt from fines.

Deleting a Block Manually

Running Day End will resolve and delete blocks according to settings made by your system administrator. However, if you need to, you can delete a block manually.



You cannot delete a “Missing” block type or a block showing an amount that has not been paid. You must check in the item considered missing, or delete the missing item in Cataloging. With an amount due block, you must clear the amount. Then you can delete the block.

To delete a block manually

- 1 In the Checkout window, identify the borrower.

Since the borrower has unresolved blocks, Horizon displays the Current Blocks window.

- 2 Highlight the blocks you want to delete.
- 3 Choose **Blocks, Delete**.

Horizon asks you to confirm the deletion.

- 4 Click **OK**.

Horizon deletes the blocks.

- 5 Click **Close**.

Managing Fees, Bills, and Payments

Circulation lets you track accounts receivable, including the appropriate audit trails and reports for balancing cash registers. (For example, your library may want to charge borrowers for interlibrary loans. Each time a borrower checks out an item from another library, you can add a fee to the borrower’s record. You can then notify the borrower of the fee, along with any other outstanding fines or fees. Finally, the borrower can make a payment toward all or part of the fee owed. You can also transact refunds and waivers.)



For information on cash transaction reports, see [Accessing Cash Transaction Statistics](#) on page 180 and [Generating a Cash Transactions Report](#) on page 183.

You perform three main functions when transacting fees:

- **Assessing Fees.** These are amounts charged to borrowers either automatically or manually. These amounts can include fines for overdue and lost items and fees for services rendered.
- **Printing and Sending Bills.** These are invoices or notices sent to the borrowers to inform and remind them of payments due. (For more information about printing notices and invoices, see the “Viewing and Sending Notices” chapter.)
- **Transacting Payments, Waivers, and Refunds.** These are amounts credited or debited by the borrower.

This section explains these topics:

- [Assessing Fees and Fines](#) on page 86
- [Using Session Payment](#) on page 89
- [Notifying Borrowers of Amounts Due](#) on page 91
- [Transacting Payments, Waivers, and Refunds](#) on page 91

Assessing Fees and Fines

Fees are calculated in one of two ways:

- **Automatically.** These system-generated fees include:
 - Overdue fines calculated at the time overdue items are checked in
 - Lost book fines, either after the final unheeded overdue notice is sent or when a staff member changes the item’s status to lost
 - Rental fees calculated when items are checked out
 - Renewal fees calculated when items are renewed
- **Manually.** These fees include any library-defined fee categories, such as interlibrary loan fees or photocopy card fees.

Once a fee is assessed, whether automatically or manually, you can change the amount owed if you have security authorization.



You transact payments for system-generated fines the same way you do for manually-added fees.

This section explains these topics:

- [HorizonAdding a Library-Defined Fee](#) on page 87
- [Changing a Fee or Fine Amount](#) on page 88
- [Viewing a List of Calculated Fines and Potential Fines](#) on page 89

Horizon Adding a Library-Defined Fee

You add fees by selecting a fee block from a list of categories that might include interlibrary loan fees and photocopy fees. If only one fee-type block exists, Horizon bypasses the list and immediately displays the window where you can enter the amount owed. The fee and amount are then listed on the Current Blocks window for the borrower.



Each fee-type block can have a sales tax amount attached to it, such as ten percent or six percent. If the block has no sales tax attached to it, or if the borrower's BTYPE is exempt from sales tax, no sales tax will be calculated. (For more information, see "Setting Up or Editing a Block Type" in the "Setting Up Blocks" section of the *Circulation Setup Guide*.)

To add a library-defined fee

- 1 In the Checkout window, identify the borrower.
Horizon displays either the Checkout window or (if the borrower has other blocks) the Current Blocks window.
- 2 Choose **Blocks, Add Fee**.
- 3 If Horizon displays the Block Types window, double-click on the fee block you want to add.

Horizon displays the Add Fee window:

- 4 Enter or verify the amount of the fee in the **Amount** field. (Enter the amount in this format: NN.NN, for example, 12.75)
- 5 Enter any comments about the fee.
- 6 Mark the appropriate **Action** button.

This determines what type of action Circulation takes with the block. There are three action types:

- **None.** Horizon takes no action on the block.
- **Print.** Horizon prints a notice or creates an e-mail message about the block to send to the borrower.

- **Review.** Horizon adds the block to the Notice Review list. This lets the circulation staff review the matter to see if any other action is needed.

For more information, see [Editing the Action Setting for Notices in the Notices for Review List](#) on page 108.

7 Click **OK**.

Horizon displays the Current Blocks window. The fee block is listed, and the amount includes the amount you entered plus any sales tax.

Note: The system administrator can set up sales tax. (For more information, see “Setting Up or Editing a Block Type” in the “Setting Up Blocks” section of the *Circulation Setup Guide*.)

Changing a Fee or Fine Amount

You can adjust any fee or fine owed by a borrower. The new amount you specify replaces the original amount for the fee as if the new amount had been the fee all along. This means that if any payments had been made against the original fee, those payments are now applied against the new amount.

If the new amount is greater than the old amount, Horizon adds an adjust debit block to the borrower’s record. If the new amount is less than the old amount, Horizon adds an adjust credit block to the borrower’s record. (For example, if the amount owed was \$10.00 and it was changed to a new amount of \$8.00, an adjust credit block of \$-2.00 is added.) You can view these adjustments in the detail window.

Horizon also adjusts any sales tax calculation for the new amount.



The system administrator can set up sales tax. (For more information, see “Setting Up or Editing a Block Type” in the “Setting Up Blocks” section of the *Circulation Setup Guide*.)

To change a fee or fine amount

- 1 In the Checkout window, identify the borrower.
Horizon displays the Current Blocks window.
- 2 Highlight the fee block with the amount you want to change.
- 3 Click **Change Amt.**

Horizon displays the Change Fee Amount dialog box:

Change Fee Amount

Fee amount 1.00

Change to

Reason

OK Cancel

- 4 In the **Change to** field, enter a new amount.

Important: Entering zero resolves the block, but may result in a refund to the patron if they had made any payments for that fee.

- 5 Enter a reason for changing the amount.

- 6 Click **OK**.

Horizon displays the Current Blocks window. The total amount due is recalculated to reflect the change.

Viewing a List of Calculated Fines and Potential Fines

Horizon levies overdue fines at the time an item is checked in. For overdue items not yet checked in, however, you can view the amount that would be levied if the item were checked in today. These are sometimes referred to as “as of today” overdue fines. Horizon does not store this amount in the database but computes it at the time of display, which results in three consequences:

- The “as of today” amount will be different the next day if the item remains out.
- Payment cannot be made for this amount until the item is checked in.
- The total amount due from the borrower does not include any “as of today” amounts.

You can view “as of today” fines by opening the borrower’s Current Blocks window. (For instructions, see [Viewing a Borrower’s Current Blocks on page 77](#).) All “as of today” fines appear in a color different from other fees:

Current Blocks

Borrower	Boune, Erika	Amt. Due	0.25
Overdues	0	Overdue Accrued Amt.	15.40

Block Type/Amount/Title

1. Billing Notice	
2. Damaged	-25.00
3. Fine Bearing an hourglass /	5.25
4. Invoice #mq.113	5.25

Selection: Blocks: 4

Buttons: Detail, CKO, Close, Payment, History, Change Amt

Total amount due. Does not include “as of today” fines.

“As of Today” amount.

Using Session Payment

The Session Payment window will pop up when you end a checkout session for a borrower who has any fees assessed to their borrower account.

Session Payment for John Doe (res - Area Resident)		
Fees and Charges		
		Pay
This Session CKO Fees	0.00	<input type="checkbox"/>
Previous Session CKO Fees	0.00	<input type="checkbox"/>
Other Fees and Charges	5.00	<input checked="" type="checkbox"/>
<hr/>		
Total Amount Due	5.00	<input type="checkbox"/>

Amount to Pay:

Comment:

Check Number:

Print Receipt

Buttons: Payment, Waiver, Close, Blocks

From the Session Payment window, you can receive payment (**Payment**) or waive the fine (**Waiver**).

If your library has set up Rental Fees or Renewal Fees, the Session Payment window will appear when a borrower either checks out or renews items. The fee amount is indicated in the **This Session CKO Fees** field. For example:

Session Payment for John Doe (res - Area Resident)		
Fees and Charges		
		Pay
This Session CKO Fees	0.88	<input checked="" type="checkbox"/>
Previous Session CKO Fees	0.00	<input type="checkbox"/>
Other Fees and Charges	0.00	<input type="checkbox"/>
<hr/>		
Total Amount Due	0.88	<input type="checkbox"/>

Amount to Pay:

Comment:

Check Number:

Print Receipt

Buttons: Payment, Waiver, Close, Blocks

If the borrower has unpaid Rental Fees or Renewal Fees from a previous session, the amount will be indicated in the **Previous Session CKO Fees** field.

Notifying Borrowers of Amounts Due

Your library can choose from several ways to notify borrowers of outstanding fees and fines. Borrowers can be notified by:

- Phone.
- E-mail.
- Printed notices and invoices.

If your library chooses to notify borrowers by phone or by e-mail, check with your system administrator for instructions. Your system administrator also sets up the type and frequency of printed notices and invoices. (For more information, see [Printing or E-mailing Notices, Invoices, and Reminders on page 109](#).) Whether a borrower is sent a notice or an invoice is determined by the borrower's BTYPE. The BTYPE contains a flag for sending either notices or invoices. (For more information, see "Defining a Borrower Circulation Type (BTYPE)" in the "Preparing Horizon to Work with Borrower Records" *Circulation Setup Guide*.)

Transacting Payments, Waivers, and Refunds

Circulation can accept and track payments, waivers, and refunds. Each time a payment, waiver, refund, or change in amount due is made, Circulation adds an entry to the payment transaction log. You can extract information using a third-party report generator and then print reports. (For more information, see "Tracking a Cash Transaction" in the *Circulation Setup Guide* and [Accessing Cash Transaction Statistics on page 180](#).) You can also view a borrower's payment history as well as the payment history for machines such as your library's public copier.

This section explains these topics:

- [Setting Workstation Parameters to Track Payments on page 91](#)
- [Transacting a Payment or Waiver Using Cash or a Check on page 92](#)
- [Transacting a Refund on page 94](#)
- [Refunding a Negative Amount on page 94](#)
- [Viewing Payment History on page 97](#)

Setting Workstation Parameters to Track Payments

You can keep track of payments made at each workstation in your library. You set workstation parameters to keep track of payments by assigning an ID to each workstation, cash drawer, and library department.



Your library director or system administrator should know your Workstation, Cash Drawer, and Department IDs.

To set workstation parameters to track payments

1 Start one of these processes:

- Open CKI Window
- Open CKO Window
- Circulation Reports

The default location of these processes is the **Circulation** folder on the navigation bar.

2 Choose **File, Change Workstation ID**.

Horizon displays the Workstation ID window:

3 Complete these fields:

Field	Action
Workstation ID	Enter the code or phrase that identifies the workstation you are using.
Cash Drawer ID	Enter the code or phrase that identifies the cash drawer you are using.
Library Department ID	Enter the code or phrase that identifies the library department where you are working.

4 Click **OK**.

Note: If you do not fill out the Workstation ID window when you first log in, Circulation displays it again when you first take fines.

Transacting a Payment or Waiver Using Cash or a Check

Your system administrator sets up categories for each type of transaction. When you record a payment or waiver, you select a category and specify the amount. If only one payment or waiver type block exists, Circulation by-passes the list and immediately displays the window where you can enter the amount owed. You can generate a receipt for the transaction.



Before you begin, check with your system administrator to make sure payment and waiver categories exist.

To transact a payment or waiver using cash or a check

- 1 In the Checkout window, identify the borrower.
Horizon displays the Current Blocks window.
- 2 Highlight the fine block to which you want to apply the payment, waiver, or refund.
- 3 Do one of these options:
 - Choose **Blocks, Cash Payment** or click **Cash**.
 - Choose **Blocks, Waiver**.
- 4 If Horizon displays a fine category list, double-click on the block category you want to add.

Horizon displays the Fine Payment window:

- 5 Enter or verify the amount being transacted.
- 6 Enter any comments.
- 7 If the borrower is using a check as payment, enter the check number in the **Check Number** field.
- 8 Mark the **Print Payment Receipt** box if you use the Circulation Slip Printer feature to print a receipt.

Note: If you have chosen to print payment receipts in the Change Receipt Options window for the Circulation Slip Printer, the check box is already checked for you. (For more information, see “Setting Workstation Receipt Options” in the “Using Circulation Slips and Receipts” of the *Circulation Setup Guide*.)

- 9 Click **OK**.

Horizon displays the Current Blocks window and sets new amounts for unresolved fees. The total amount owed is also updated to reflect the payment.

Transacting a Refund

You transact a refund by selecting a refund category and entering the amount of the refund. You can only refund money that Circulation considers spent. That is, you must select a block showing a negative amount from the borrower's Current blocks window before you can access the Refund command.

If a borrower pays the fine for a lost item block, and that item is later found and checked in, Horizon refunds that borrower for the amount previously paid.



If a borrower owes the library other fines or fees, Horizon does not allow you to transact a refund until all amounts due are paid.

When an item (reported as lost and paid for) is checked in, Horizon checks the circulation history to identify the borrower who had the missing item last. When that borrower number is identified, Horizon checks the burb history to verify that there is a lost-with-payment block for the borrower number and item number in question. If found, Horizon generates a credit block (with some additional information blocks for the total payment amount).

When the item (previously reported as lost) is checked in, Horizon modifies the borrower's blocks and credits the borrower for the lost item fee.

The borrower's Current Blocks window at this point would look like this:

Block Type	Amount	Date
1. Billing Notice		05/10/02
2. Fees	-2.50	12/04/15
3. Fine	2.50 - Item not found:	07/19/97

Selection: Blocks: 3

Payment:

Refunding a Negative Amount

Two unique situations may pose a problem in balancing the cash drawer and accounting for the missing money:

- The amount being refunded no longer appears on the borrower's list of current blocks.

For example, if a borrower paid for the lost book a while ago and only found it after the payment block was purged from the borrower's block history, no negative amount exists in the Current Blocks list for you to select. That negative

amount must appear in the list before you can refund the amount. You can then refund an existing negative amount.

- The amount being refunded does not need to be recorded in the borrower's record yet needs to be accounted for in the cash drawer.

For example, a borrower's money gets "eaten" by the library copy machine. You need to refund the money and account for it in the cash drawer, but also keep the transaction off the borrower's record. To do this, create a pseudo borrower record for the copy machine. You would then assign a fee type to the copy machine, enter a negative amount, and then refund the amount to the borrower. You can then refund what is considered a non-existing negative amount.

This section explains these topics:

- [Refunding an existing negative amount on page 95](#)
- [Refunding a non-existing negative amount on page 96](#)

Refunding an existing negative amount

To refund an existing negative amount

- 1 In the Checkout window, identify the borrower.

Horizon displays the Current Blocks window.

- 2 Highlight the block showing the negative amount.

Important: The amount must be a negative, such as -10.00 or -00.50.

- 3 Choose **Blocks, Refund**.

Horizon displays a Refund of Payment window:

The screenshot shows a dialog box titled "Refund of Payment". It has a standard Windows-style title bar with a close button (X). The dialog contains the following elements:

- Amount:** A text input field containing "5.00".
- Comment:** A larger text input field, currently empty.
- Check Number:** A text input field, currently empty.
- Print Payment Receipt:** A checkbox that is currently unchecked.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

- 4 Enter or verify the amount being refunded.
- 5 Enter any comments.
- 6 Mark the **Print Payment Receipt** box if you use the Circulation Slip Printer feature to print a receipt.

Note: If you choose to print payment receipts in the Change Receipt Options window for Circulation Slip Printer, the box is already checked for you. (For more information, see "Setting Workstation Receipt Options" in the "Using Circulation Slips and Receipts" of the *Circulation Setup Guide*.)

- 7 Click **OK**.

Horizon displays the Current Blocks window and sets new amounts for any remaining unresolved fees.

Refunding a non-existing negative amount

To refund a non-existing negative amount

- 1 In the Checkout window, identify the borrower.

Horizon displays the Current Blocks window.

Note: If the “borrower” is a machine for which you are refunding lost monies, you must first set up a borrower record for the machine. (For instructions, see [Adding a New Borrower Record](#) on page 126.)

- 2 Choose **Blocks, Add Fee**.
- 3 If Horizon displays a list of fee block types, double-click on the block type you want to add.

Horizon displays the Edit Add Fee window:

- 4 Enter, as a negative number, the amount you need to refund. (For example, enter “-7.50”.)
- 5 Enter any comments.
- 6 Mark the appropriate **Action**:
 - **None.** Horizon prints no receipt and does not add the block to the Notice Review list.
 - **Print.** Horizon prints a receipt.
 - **Review.** Horizon places the block on the Notice Review list for further review.

For more information, see [Using the Notices for Review List](#) on page 107 and [Editing the Action Setting for Notices in the Notices for Review List](#) on page 108.

7 Click **OK**.

Horizon displays the Current Blocks window. A line for the amount you want to refund should appear in the list.

8 Highlight the negative amount you just added.

9 Choose **Blocks, Refund**.

Horizon displays a Refund of Payment window:

10 Enter or verify the amount being refunded.

11 Enter any comments.

12 Mark the **Print Payment Receipt** box if you use the Circulation Slip Printer feature to print a receipt.

Note: If you choose to print payment receipts in the Change Receipt Options window for Circulation Slip Printer, the box is already checked for you. (For more information, see “Setting Workstation Receipt Options” in the “Using Circulation Slips and Receipts” of the *Circulation Setup Guide*.)

13 Click **OK**.

Horizon displays the Current Blocks window and sets new amounts for any remaining unresolved fees.

Viewing Payment History

You can view a list of payment transactions made by a borrower during a selected date or range of dates. You can also view the payment history for machines, such as copy machines, in your library for which you want to track transactions and balance funds.

To view payment history

1 In the Checkout window, identify the borrower.

2 If Horizon displays the Current Blocks window, click **CKO**.

Horizon displays the Checkout window with the borrower’s name.

3 Choose **Borrower, Payment History**.

Horizon displays a window in which you can enter a date after which you want to view all payment transactions.

- 4 Enter the date in the field.
- 5 Click **OK**.

Horizon displays the Payment History window:

Date	Dept.	Payment	Fee	Amount	Descr
09-06-97	1234	payment	fee	5.00	Fees

Close Display ... Since ... Select Fee Code ... Total: 1

This window lists payment transactions made since or during the specified date.

- 6 Click one of these buttons:
 - **Display.** Use this button to change what information is displayed on the window.
 - **Since.** Use this button to change the date after which transactions are displayed.
 - **Select Fee Code.** Use this button to display a list of valid fee codes that apply to the payment history for the borrower.

Chapter 5: Notices

This chapter explains how to use notices, reminders, and invoices to help you work with borrowers.

This chapter contains these topics:

- [About Notices](#) on page 99
- [Understanding Types of Notices](#) on page 100
- [Using the Notices for Review List](#) on page 107
- [Printing or E-mailing Notices, Invoices, and Reminders](#) on page 109
- [Printing Notices for Multiple Locations](#) on page 122
- [Sending a General SMS Message](#) on page 122

About Notices

Notices and invoices are contacts made with borrowers through letters, e-mail messages, or phone calls. These contacts inform the borrower of unresolved library business, such as overdue items, fines or fees, items on hold, or expired holds. Reminders are letters sent to borrowers as a follow-up to previously sent billing or overdue notices.

Notices are generated in one of two ways:

- **By Day End.** Horizon generates notices automatically when parameters which were set by your system administrator have been reached. (For example, if notices are set to be sent every seven days after the first notice, Horizon generates notices for blocks that have had an initial notice generated seven days prior to the current date.)
- **By library staff.** You can generate notices manually when you choose Notice, Notice Output in Circulation Reports.



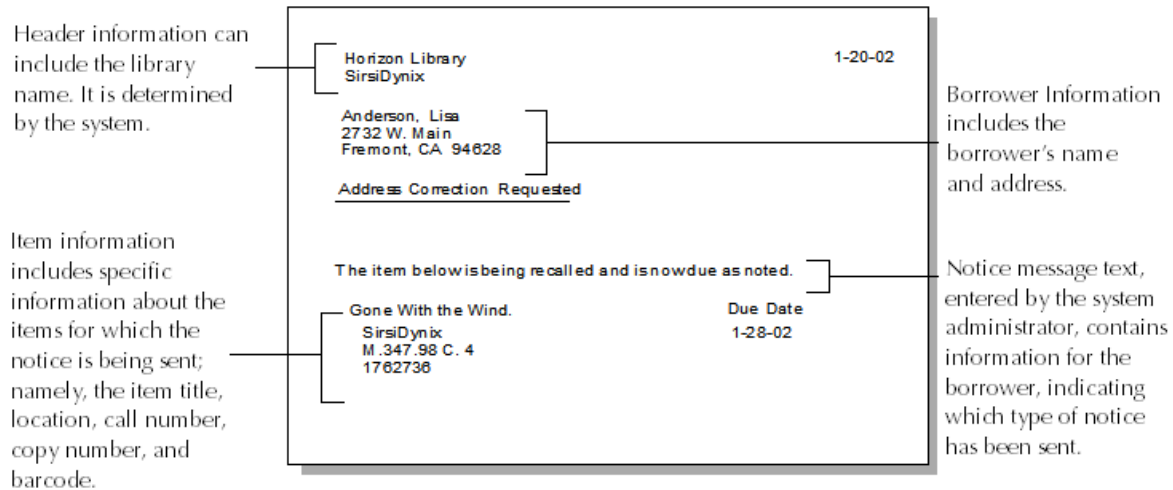
Generating notices in this context is not the same as printing them. Most notices are generated by Day End processes. But Day End only *compiles* the notices; it does not print them. Library staff print the notices using Circulation Reports. (For more information, see [Printing or E-mailing Notices, Invoices, and Reminders](#) on page 109.)

Understanding Types of Notices

Notices inform the borrower of fees or fines that they owe. Your library can use Horizon to automatically send printed or electronic notices to borrowers. You can send default notices using the format that Horizon provides, or you can customize the appearance and content of the notices. (For more information, see “Defining Notices, Invoices, and Reminders” in the *Circulation Setup Guide*.) The information in e-mail notices and printed notices is identical.

Your system administrator sets parameters that determine the types and timing of notices that Horizon generates. When the parameters are met, you can use the notice generator in Circulation Reports to prepare the notices.

Here is an example of a notice:



Although the specific types of notices will differ between libraries (depending on which blocks your library has set to print), these are the most common types of notices:

- [Hold Request and Hold Notices on page 101](#)
- [Recall Notices](#)
- [Overdue Notices](#)
- [Billing Notices](#)
- [Reminder Notices](#)
- [Invoices](#)
- [Reminder Invoices](#)

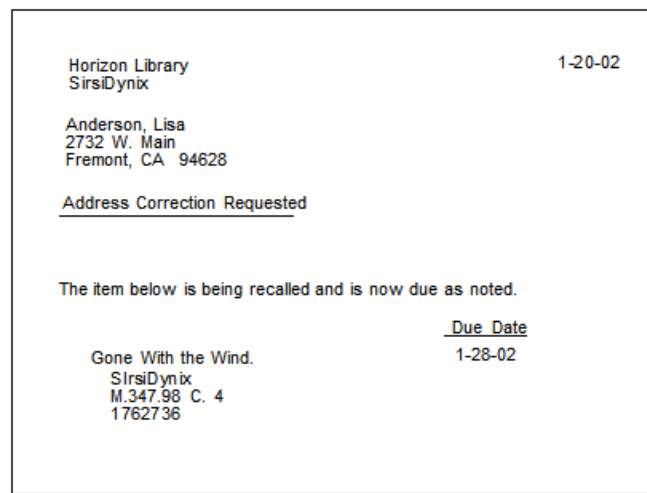
Hold Request and Hold Notices

When an action has been taken on a hold request or hold, Day End processes compile this information and generate notices. Which specific notices your library sends out depends on your library policy. (For example, almost all libraries send notices informing borrowers that a requested item is now on hold and they can come in to check it out. However, only some libraries send out notices when the hold request for an item expires or when the library cancels a hold.) (For more information on the hold request and hold notices your library sends, see your system administrator.)

Recall Notices

This type of notice is sent to a borrower who has an item that has been recalled. (For more information, see [Recalling an Item to Fill a Request](#) on page 52.) Day End processes compile the recall notice information when a Recall block is detected on the borrower's record. After the notice is generated, the block is moved to the borrower's history blocks record.

Here is an example of a recall notice:



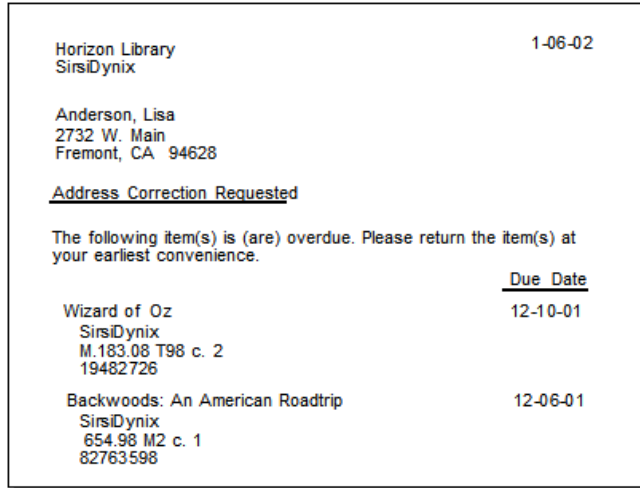
Overdue Notices

These notices are sent whenever a borrower has an overdue item. Several different overdue notices can be sent out. (For example, you might send out the first notice a week after an item becomes overdue, and then send out a notice each week for the next three weeks if the item is not returned.) The number of notices sent out is set by your system administrator.

Overdue notice information is compiled by Day End processes when Horizon detects an "Overdue Still Out" block on the borrower's record. When a notice is generated, Horizon places the corresponding block on the borrower's record. (For example, a First Notice block is attached to an "Overdue Still Out" block once the first notice is generated.)

If Horizon generates several overdue notices or a billing notice for a borrower, all the notices for that specific borrower will be printed on the same pages.

Here is an example of an overdue notice:



Horizon also prints proxy borrower information on overdue notices. (For more information on proxy borrowers, see [Setting Up a Proxy Borrower](#) on page 151.)

You can also use Day End processes to generate overdue, pre-overdue, and hold notices and email them or print them in one step. For more information, see the "A Listing of Day End Processes" section of the *Horizon System Administration Guide*.

Billing Notices

These notices are sent when a borrower's total fine amount reaches a set limit. Your library determines the limit that fines must reach before sending a billing notice. Since the billing notice is generated for the total fine amount, the notice does not list each individual fine amount, but instead gives the total amount due. (For more information, see [Printing or E-mailing Notices, Invoices, and Reminders on page 109](#).)

When the notice is generated, Horizon attaches an Automatic Bill Sent notice to each individual fine block so that if you access the Block Detail window for that block, you can tell that the borrower has been notified of the unpaid fine.

If Horizon generates several overdue notices and a billing notice for a borrower, all the notices for that specific borrower will be printed on the same page.

Here is an example of a billing notice:

Horizon Library SirsiDynix		1-20-02
Anderson, Lisa 2732 W. Main Fremont, CA 94628		
<u>Address Correction Requested</u>		
The following charges have been incurred since the last notice and should be paid immediately. Thank you for your prompt attention to these charges.		
User ID	Photocopy card	2.00
Gone With the Wind. SirsiDynix M.347.98 C. 4 1762736	Lost	20.00
The Firm SirsiDynix Gris888.9 C. 1 29282883	Lost	<u>20.00</u>
Total Charges Outstanding:		42.00

You can disable the generation of billing notices for different locations. (For more information, see “Setting Up a Location Record” in the “General Setup” chapter of the *System Administration Guide*.)

Reminder Notices

Reminder notices (referred to as reminders) combine both overdue notices and billing notices.

You generate reminders manually, rather than relying on Horizon to generate them automatically. When you select the Print Reminders command in Circulation Reports, Horizon checks to see if there are any borrowers who have exceeded a certain number of overdue items or who have more than a certain fine amount. Reminders are generated for borrowers who have exceeded at least one of these limits. (For more information, see [Printing or E-mailing Notices, Invoices, and Reminders on page 109](#).)

The overdue and fine limits are set by each library and are usually quite high so that reminders are sent only to people who have many overdues or a very high unpaid fine. The normal overdue and billing notices should be sufficient for other borrowers.

There are no blocks associated with reminders, and reminder notices are printed on pages separate from regular notices.

Here is an example of a reminder notice:

Horizon Library SirsiDynix		1-06-02
Anderson, Lisa 2732 W. Main Fremont, CA 94538		
<u>Address Correction Requested</u>		
The following item(s) is(are) overdue:		<u>Due Date</u>
A Time to Kill SirsiDynix: Gris. 178.M19 c.2 18598372		09-10-01
The following charges remain outstanding. Please arrange to pay these charges at your earliest convenience.		
User ID	Photocopy card	1.05
The Firm SirsiDynix Gris.173.M18 c.4 1013458	Lost	30.00
The Kid's Book of Questions SirsiDynix Whl. 679.8 c.1 6374898	Lost	28.95
Invoice 2387	Fees	<u>15.60</u>
Total Charges Outstanding:		75.60



In Circulation Reports, Horizon sorts printed Reminder Notices by borrower number and invoice number.

Invoices

Numbered invoices can be produced according to a library-specified billing cycle. Invoices list previously uninvoiced fees but do not include unpaid balances or details of unpaid previous invoices.

This is an example of a printed invoice:

Header information can include the library name. Determined by the system administrator.

Borrower information can include the borrower's name and address. Taken from the borrower's record.

Footer information can include return address and payment method. Defined by the system administrator.

Horizon Library
SirsiDynix

Invoice No. 29 03-24-02

TO: Anderson, Lisa
2732 W. Main
Fremont, CA 94538

Assessed	Fee Code	Description	Price
03-24-02	fee	Payment for replacing damaged book	15.00
03-24-02	salestax	Sales tax	0.75
Total due this invoice:			15.75

SirsiDynix
ATTN: Business Office
Return form with payment
400 West 5050 North
Provo, UT 84604
(801) 223-5200; fax: (801) 223-5203
Make check or money order payable to:
SirsiDynix

Invoice information includes invoice prefix, number, and date. System-generated.

The list of fees includes all previously uninvoiced fees, the date each was assessed, a description of the fee, the amount owed for each, and a total of fees owed.

Invoices are generally grouped according to four categories:

- **Billing Cycle.** Different invoices can be sent out monthly, bi-monthly, weekly, quarterly, and so forth.
- **BTYPES.** Different BTYPES can receive different invoices.
- **Fee Types.** Different invoices can be sent for different types of fees assessed.
- **Amount Threshold.** Invoices can be generated when borrowers accrue a specified amount.

For example, monthly invoices might be sent out for interlibrary loan fees and photocopy fees to all BTYPES when a borrower accrues a \$5.00 total of these two fee types. Weekly invoices might be sent out to all BTYPES for overdue fines when borrowers have accrued \$2.50 in fines.

Your system administrator sets up the types of invoices, the BTYPES to which invoices are sent, the fee types for which invoices are sent, and the amount threshold for each invoice type.

Your library can have as many invoice types as needed.

Reminder Invoices

Reminder invoices combine information from all invoices for a borrower and are sent out in addition to the regular invoices. With the Reminder Invoice, all of the accumulated charges on one borrower's account are gathered on one invoice. The number of days Horizon will delay sending out a Reminder Invoice after a regular

invoice remains unpaid is determined by your system administrator.
 Here is an example of a reminder invoice:

Each invoice is listed separately, with information including the date fees were assessed, fee codes, descriptions of the fee, and the fee amounts.

This is the total amount of all invoices on the Reminder Invoice.

Horizon Library
 SirsiDynix
 03-14-02
 Reminder Notice

TO: Anderson, Lisa
 2732 W. Main
 Fremont, CA 94538

Invoice No. 119
 dated 01-14-02

Assessed	Fee Code	Description	Price
12-21-01	fee	Payment for replacing damaged book.	15.00
12-21-01	salestax	Sales tax	0.75
Total due this invoice:			15.75

Invoice No. 130
 dated 02-14-02

Assessed	Fee Code	Description	Price
01-24-02	fee	Payment for replacing damaged book.	34.00
01-24-02	salestax	Sales tax	1.75
Total due this invoice:			35.75

Total due all invoices: 51.50

SirsiDynix
 ATTN: Business Office

Return form with payment

400 West 5050 North
 Provo, UT 84604
 (801) 223-5200; fax: (801) 223-5203

Make check or money order payable to
 SirsiDynix

This is the total amount of each separate invoice.

Reminder invoices are generated manually, rather than automatically by Horizon. (For more information on printing reminder invoices, see [Printing or E-mailing Notices, Invoices, and Reminders](#) on page 109.)



In Circulation Reports, Horizon sorts printed reminder invoices by borrower number and invoice number.

Using the Notices for Review List

The Notice Review function lets you display a list of pending notices to review for further action. (For example, if an entry explains that a borrower needs to come in and pay a card fee, you can choose to send the borrower a notice about the fee or leave the entry marked for further review.)

Horizon creates this list from blocks that are assigned a Review action setting. Your system administrator determines which blocks have a Review setting at your library. (For more information, see “Setting Up a Block Type” in the “Setting Up Blocks” section of the *Circulation Setup Guide*.) You can view and print the Notices for Review list.

Here is a sample Notices for Review list window:

The list box lists all borrowers and the types of notices they should receive.

Borrower/Comment	Type	Date
1. Anderson, Lisa The sum of all Fears / Tom Clancy	Request	03-00-97
2. Tubbs, Ricardo	Hold	02-14-97
3. Tubbs, Ricardo Maus II : a survivor's tale : and hear my troubles	Request	03-08-97
4. Goodsell, Jann Y/herry	Final	04-26-97
5. Newman, George	Final	04-26-97
6. Kuni, Yoshi When you look like your passport photo, It's time to	Request	04-18-96

Selection Total: 23

Lets you sort the list according to selected criteria.

Lets you change the type of information displayed for items on the notice list.

While viewing the Notices for Review list, you can edit an item’s action setting. (For example, you can choose the items for which you want Horizon to print notices to send to borrowers.)

This section explains these topics:

- [Viewing and Printing the Notices for Review List](#) on page 107
- [Editing the Action Setting for Notices in the Notices for Review List](#) on page 108

Viewing and Printing the Notices for Review List

The Notices for Review list lets you review notices and decide what should be done about them before you print or delete notices. If you want, you can print out the list to review it.



You can print a review list of notices, but it is not the same as printing notices. The review list only lists borrowers and the type of notice they should receive. It does not include the actual notice to be sent to the borrower.

To view and print the Notices for Review list

- 1 Start the **Circulation Reports** process.
The default location of this process is the **Circulation** folder on the navigation bar.
- 2 Choose **Notices, Notice Review**.
Horizon displays the Notices for Review list window.
- 3 Choose **File, Print**.

Editing the Action Setting for Notices in the Notices for Review List

You can choose what action you want Horizon to take for each item in the Notices for Review list. (For example, if an entry explains that a borrower needs to come in and pay a card fee, you can choose to send the borrower a notice about the fee or leave the entry marked for further review.)

To edit the action setting for notices in the Notices for Review list

- 1 Display the Notices for Review list window.
- 2 Highlight the entry (or entries) whose action you want to change and click **Edit**.

Horizon displays the Edit Notices For Review window showing information about the entry you selected:

If you choose more than one entry to change at the same time, Horizon asks you to confirm that you want to make a batch change to all the selected records.

- 3 Mark the appropriate **Action**:
 - **Take no action.** Horizon takes no action on the block.

Note: This action setting removes the item from the Notice Review list.

- **Print hard copy notice.** Horizon generates a hard copy notice or an e-mail message about the block to send to the borrower.
- **Review before doing anything.** The entry remains on the Notice Review list.

4 Save your changes.

Printing or E-mailing Notices, Invoices, and Reminders

You can generate notices and reminders to help borrowers take care of business with your library. As soon as Day End has updated borrower blocks, notices are ready to print. You print the notices—as well as reminders and invoices—from Circulation Reports. (For more information, see [Using the Horizon Circulation Reports Process on page 169](#).)

You can print a batch of invoices, reminder invoices, notices, or reminders from Circulation Reports for groups of borrowers. You can print individual invoices or reminder invoices for fees assessed for the current borrower identified in Circulation. Horizon also gives you the option of e-mailing certain types of notices.

This section explains these topics:

- [Printing or E-mailing a Batch of Notices, Invoices, or Reminders on page 109](#)
- [Printing or E-mailing a Batch of Overdue and Hold Notices Automatically on page 113](#)
- [E-mailing a Batch of Pre-overdue Notices Automatically on page 118](#)
- [Printing a Single Invoice on page 121](#)

Printing or E-mailing a Batch of Notices, Invoices, or Reminders

You can print batches of invoices, reminder invoices, notices, or reminders using the Circulation Reports process. If your system administrator has set it up, you can generate and automatically send e-mail notices to your borrowers instead of using printed notices or telephone contact. (For more information, see “Setting Up E-mail Notification” in the “Defining Notices, Invoices, and Reminders” section of the *Circulation Setup Guide*.)



If your system administrator has set up Horizon to use a flat-file only, Horizon generates an e-mail text file for borrowers who want to use e-mail notification. You can use a third-party program to access the e-mail text file, modify it, and send it as a customized e-mail message.

You generate a batch of notices at a time. A batch includes all notices that you want to print and e-mail. Horizon can handle printing and e-mailing of designated notices in one task.

Do these tasks if you want to e-mail notices:

- Have your system administrator set up e-mail parameters. (For instructions, see the “Setting Up E-mail Notification” in the “Defining Notices, Invoices, and Reminders” section of the *Circulation Setup Guide*.) In the records of the borrowers to whom you want to send e-mail notification, complete these fields:

Field	Action
Notice By	Mark the E-mail option.
E-mail Name	Enter the borrower’s name. The information in this field is not included in the e-mail address, but becomes part of the e-mail header.
Internet Addr.	Enter the borrower’s entire e-mail address in this field. Horizon uses this address to send e-mail notices to borrowers.

Note: You must designate that a borrower wants e-mail notification before you create a batch of notices. When you create the notice batch, Horizon identifies the notification method for each notice. You cannot change this method for a created batch.

- Have your system administrator run Day End to update blocks. (For instructions, see “Running Day End” in the “Maintenance and Day End” chapter of the *System Administration Guide*.)

When Horizon creates a notice batch, it creates it for the default location. If you want, you can change the location.

Your system administrator can also configure Day End to print or email overdue, pre-overdue, and hold notices automatically. For more information, see [E-mailing a Batch of Pre-overdue Notices Automatically](#) on page 118.

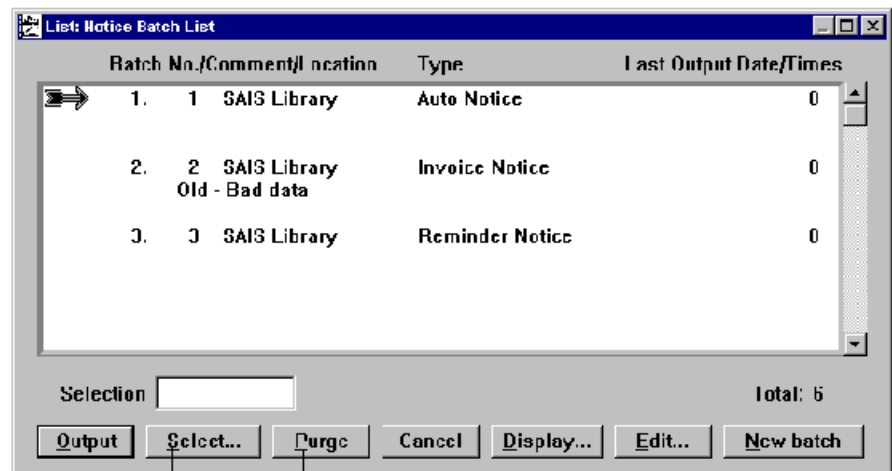
To print or e-mail a batch of notices, invoices, or reminders

- 1 Start the **Circulation Reports** process.

The default location of this process is the **Circulation** folder on the navigation bar.

- 2 Choose **Notices, Notice Output**.

Horizon displays the Notice Batch List window:

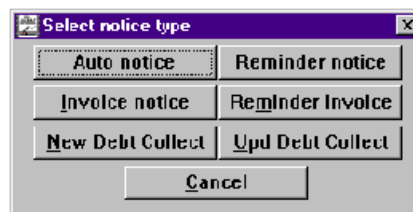


Displays information about the invoices or notices in the selected batch.

Deletes a selected row and purges the invoices or notices from the database.

3 Click **New Batch**.

Horizon displays the Select Notice Type dialog box:



4 Choose the notice type you want to print:

- **Auto notice.** This is a system-generated notice. If you want, you can e-mail this type of notice.
- **Reminder notice.** This is a follow-up notice to one already sent. If you want, you can e-mail this type of notice.
- **Invoice notice.** This is a numbered invoice.
- **Reminder invoice.** This a follow-up invoice to one already sent.
- **New Debt Collect.** This is a Debt Collect notice (which appears if you own the Horizon Debt Collect product).
- **Upd Debt Collect.** This is an updated Debt Collect notice (which appears if you own the Horizon Debt Collect product).

Note: When Horizon creates a notice batch or Debt Collect batch, it creates it for the default location. When Horizon prompts you, you can change the location.

Horizon displays the List Notice Batch List with the new batch displayed as the latest entry:

Batch No./Comment/Location	Type	Last Output Date/Times
5. 5 SAIS Library	Auto Notice	07/06/2003 1
6. 6 SAIS Library	Auto Notice	07/06/2003 1
7. 7 SAIS Library	Invoice Notice	07/06/2003 0

The Times column displays the number of times this report has been printed.

- 5 If you want to print and e-mail several batches at once, repeat steps 3 and 4 to create the remaining batches.
- 6 Do one of these options:
 - If you want to send an entire batch of notices, highlight the batch you want to print or e-mail, then continue with step 7.
You can choose multiple batches.
 - If you want to choose specific notices from a batch to send, do these steps:
 - a Double-click the batch from which you want to choose notices.
Horizon displays a list of the notices in the batch.
 - b Highlight the notices that you want to send.
Horizon displays a check mark in the Send Email column for those items that you have set up to receive e-mail.
 - c If you want to print notices even if the borrower has requested e-mail notification, click **Force Print**; otherwise, skip to step 7 of this task.
If you are printing notices, Horizon displays a print window.
 - d Follow the procedure to print the notices.
Once you print the notices, the task is done. Skip the remaining steps.
- 7 Click **Output**.
- 8 Do one of these options:
 - If any of the notices that Horizon has generated should be printed instead of e-mailed, Horizon displays a print window.
Follow the procedure to print the notices.
 - If any of the notices that Horizon has generated should be e-mailed instead of printed, Horizon displays a progress bar as it sends the e-mail notices.
- 9 Close any open dialog boxes.

Printing or E-mailing a Batch of Overdue and Hold Notices Automatically

Day End can compile batches of overdue and hold notices and print them or send them via email in one step using the Day End Create and Output Notices process. The way Horizon distributes these notices depends on the configuration of the location's default hold notice type and whether a borrower is configured to receive email messages.

To configure Day End to print or e-mail overdue notices automatically

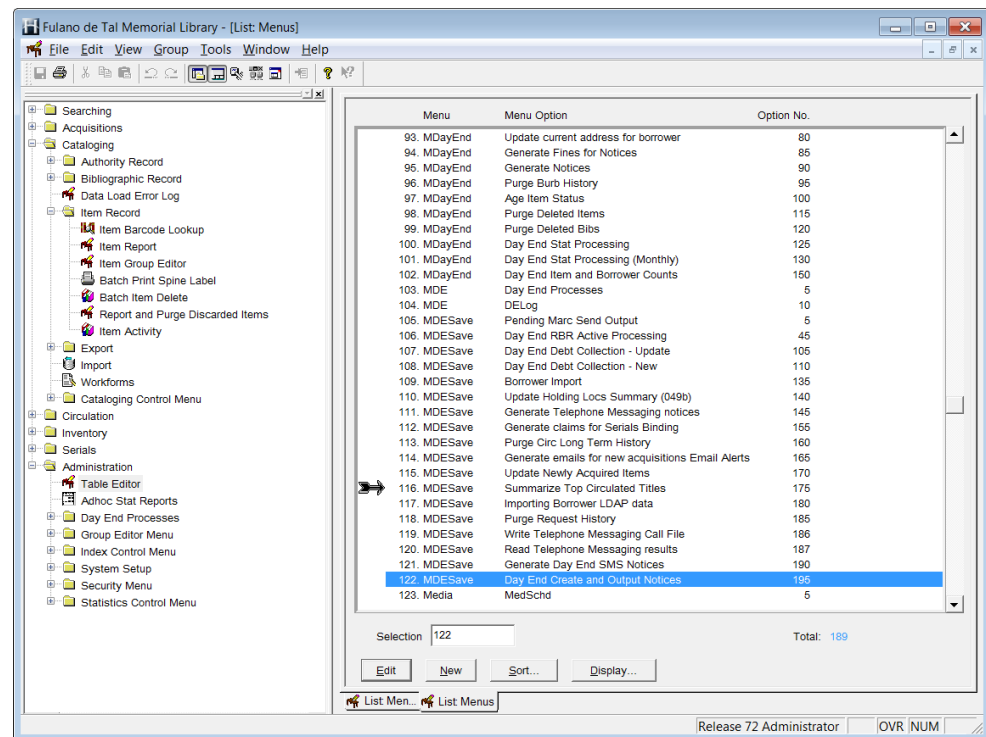
- 1 Start the **Table Editor** process.

The default location of this process is the **Administration** folder on the navigation bar.

Horizon displays the Code Lookup Horizon View window.

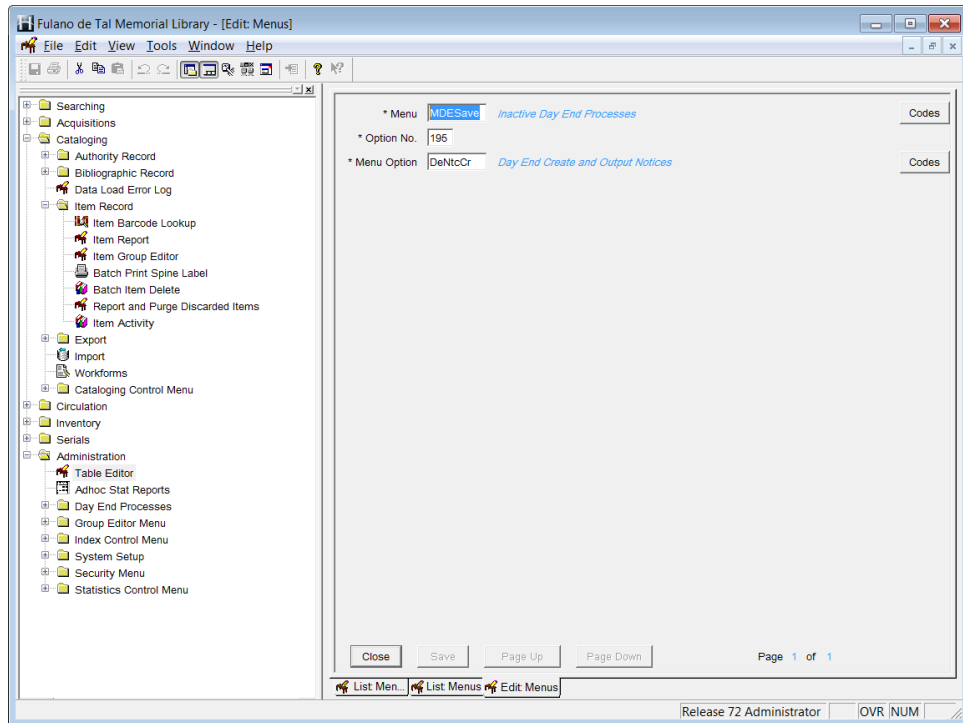
- 2 Open the **menu** view.

Horizon displays the List Menus window.



- 3 Double-click the **Day End Create and Output Notices** menu option.

Horizon displays the Edit Menu window:



4 Change the value of the **Menu** field to MDayEnd.

5 Click **Save** and click **Close**.

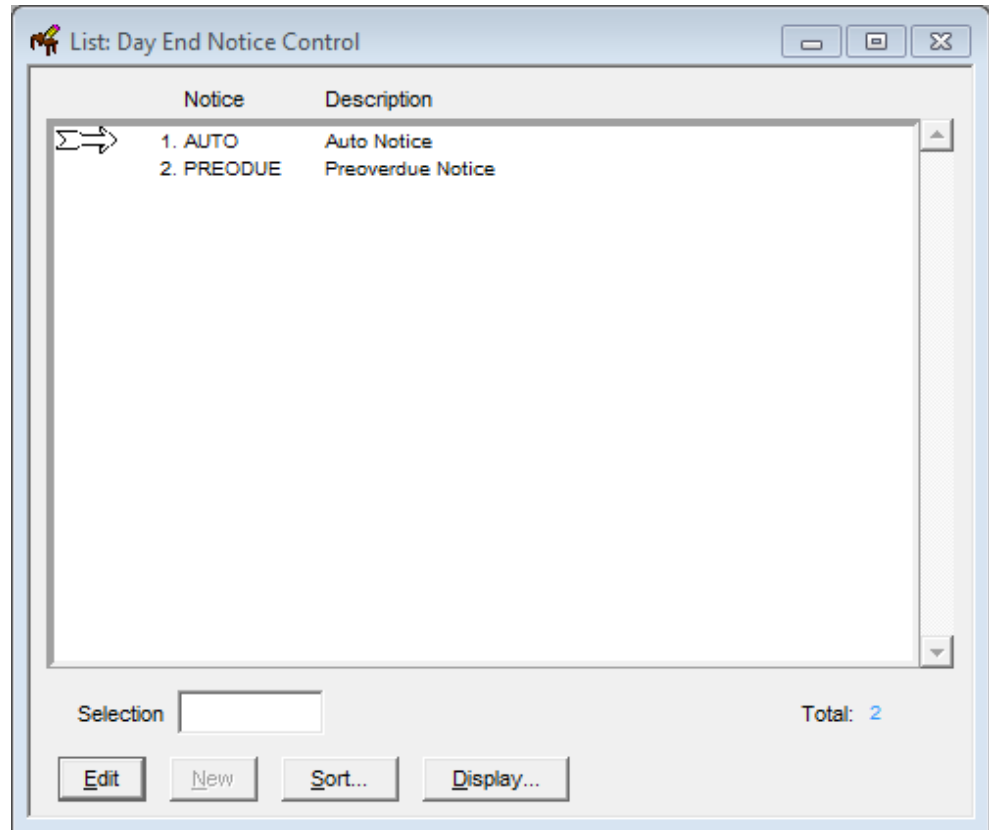
The process is added to the Day End processes.

6 Start the **Table Editor** process again.

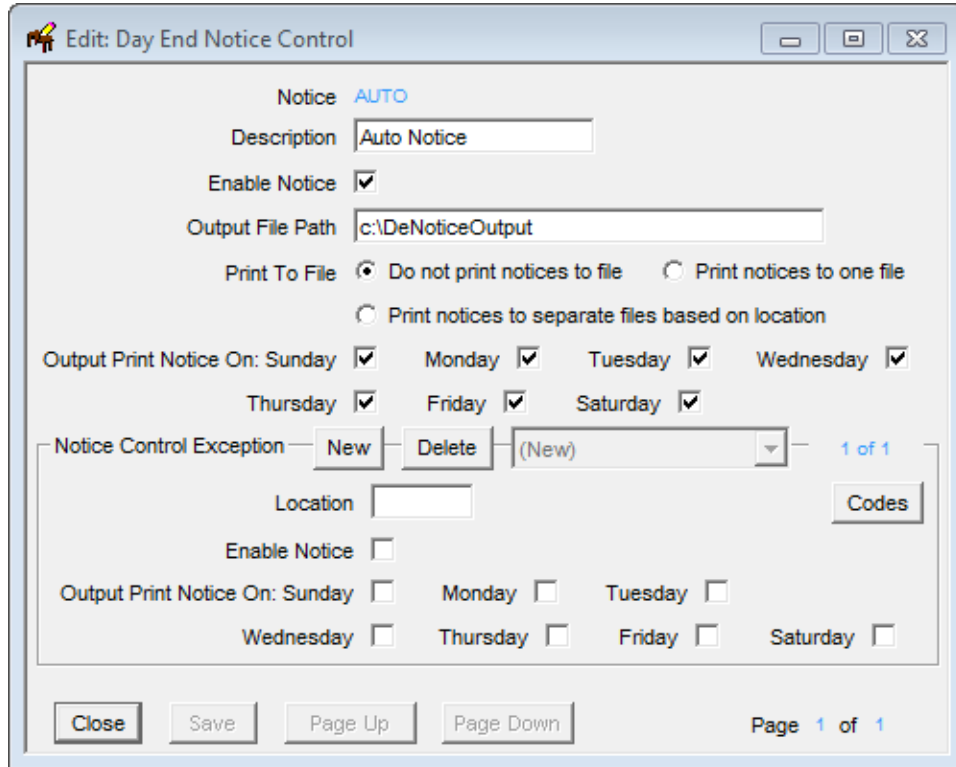
Horizon displays the Code Lookup Horizon View window.

7 Open the **de_ntc_ctl** view.

Horizon displays the List: Day End Notice Control window.



- 8 Double-click the **AUTO** option.
- 9 Horizon displays the Edit: Day End Notice Control window.



10 Complete these fields and options:

Field	Description
Description	Enter or edit the name of the automatic notice process.
Enable Notice	Check the Enable Notice check box to configure Horizon to generate notices automatically for all locations. Leave the Enable Notices check box unchecked to configure Horizon to not generate the notices automatically for all locations.
Output File Path	Enter the file path to where Horizon should write the email notices batch file along with the base filename using the following as a template: <code><drive letter>:\<path>\<file name></code> Important: Do not include the extension on the file name. Depending on which Print To File option you choose, Horizon completes the filename and adds the extension. When Do not print notices to file is selected, Horizon automatically uses this file to send the generated email notices. Otherwise, Horizon creates the file PDF file according to the template explained in the Print to File options below.

Field	Description
Print To File	<p>Select the print to file option you want:</p> <ul style="list-style-type: none"> Do not print notices to file: sends day end notices to the default printer. The notices print using the font selected for the default printer specified when setting up the Circulation Report. Print notices to one file: creates a Portable Document Format (PDF) file that contains all of the notices. The notices are not sent to the printer. The file name is designated by a standard name plus the date and time, according to this template: <file name>mmddyyyy_hhmmss_all.pdf. The notices are saved to PDF format using the Courier, Helvetica, or Times font selected for the default printer specified when setting up the Circulation Report. If a different font is selected for the default printer, the font defaults to Helvetica. Print notices to separate files based on location: creates separate PDF files that contain the notices for the various locations in the system. The file names are designated by a standard name plus the date and time, according to this template: <file name>mmddyyyy_hhmmss_<location>.pdf. The notices are saved to PDF format using the Courier, Helvetica, or Times font selected for the default printer specified when setting up the Circulation Report. If a different font is selected for the default printer, the font defaults to Helvetica.
Output Print Notice On	<p>Select the days on which to print the notices. The notices are printed for all locations on the days you specify.</p> <p>Note: This option does not affect the email notices, which are generated daily.</p>
Notice Control Exception	<p>Create a location specific notice control setting that overrides the general notice control for that location.</p>
Location	<p>Enter the location for which you want to apply the exception.</p>
Enable Notice	<p>Check the Enable Notice check box to configure Horizon to generate notices automatically for the specified location. Leave the Enable Notice check box unchecked to configure Horizon to not generate the notices automatically.</p>
Output print notice on	<p>Select the days on which to print the notices for the specified location. The notices are printed on the days you specify.</p> <p>Note: This option does not affect the email notices, which are generated daily.</p>

11 Click **Save** to save the configuration, then click **Close**.

Overdue and hold notices will now be generated and printed or sent automatically as part of the Day End processes.

E-mailing a Batch of Pre-overdue Notices Automatically

Day End can generate batches of pre-overdue notices and send them via email in one step using the Day End Create and Output Notices process, if borrowers are configured to receive email messages.

To configure Day End to print or e-mail overdue notices automatically

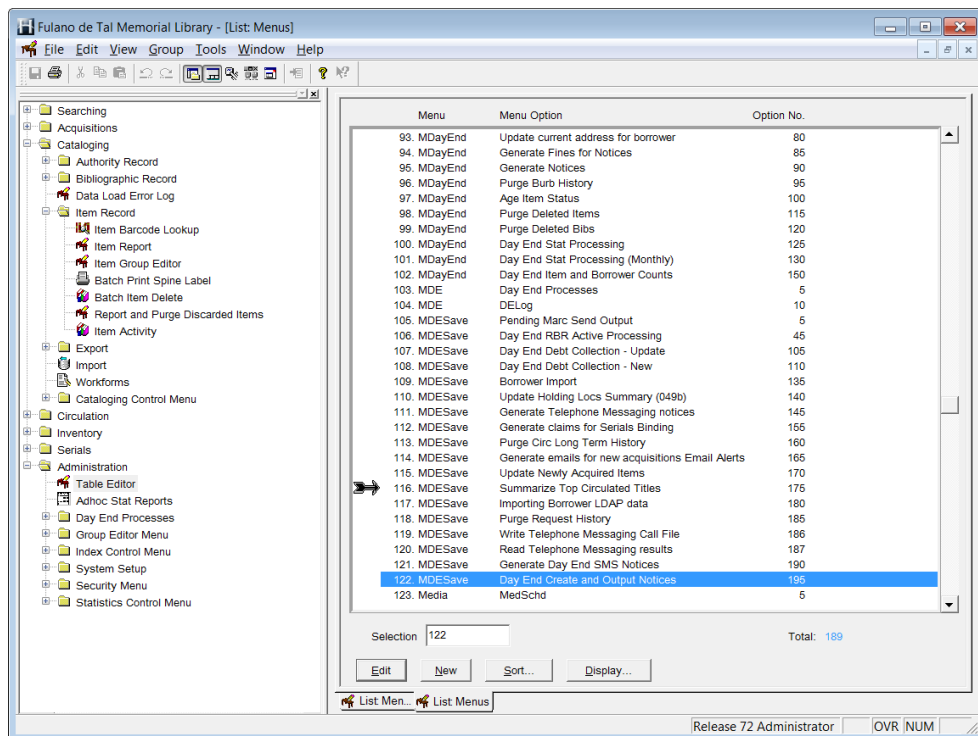
- 1 Start the **Table Editor** process.

The default location of this process is the **Administration** folder on the navigation bar.

Horizon displays the Code Lookup Horizon View window.

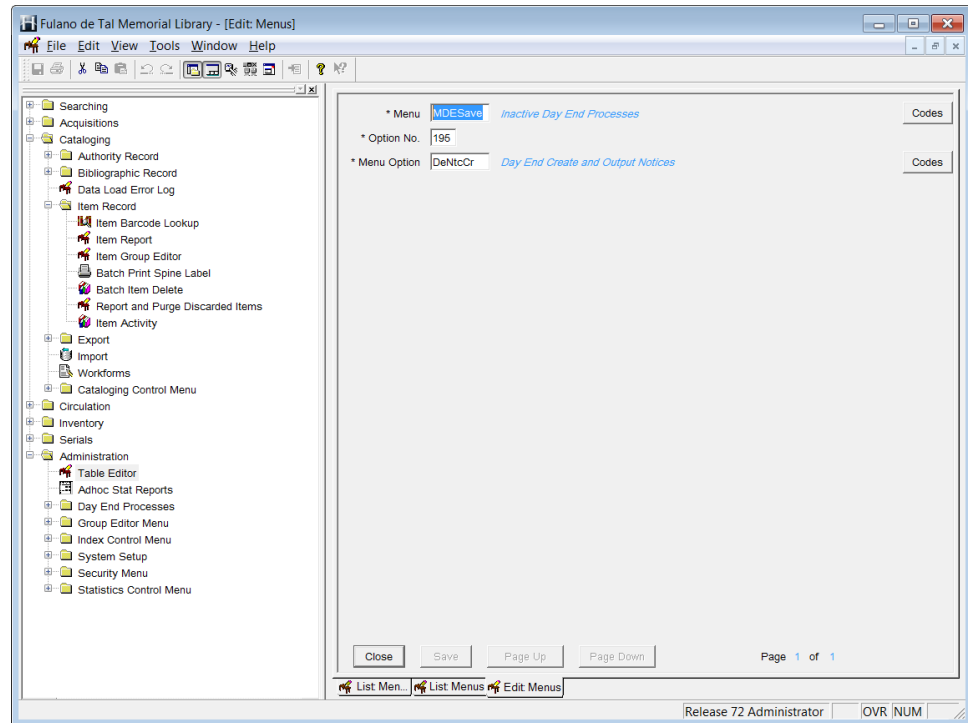
- 2 Open the **menu** view.

Horizon displays the List Menus window.



- 3 Double-click the **Day End Create and Output Notices** menu option.

Horizon displays the Edit Menus window:



4 Change the value of the **Menu** field to MDayEnd.

5 Click **Save** and click **Close**.

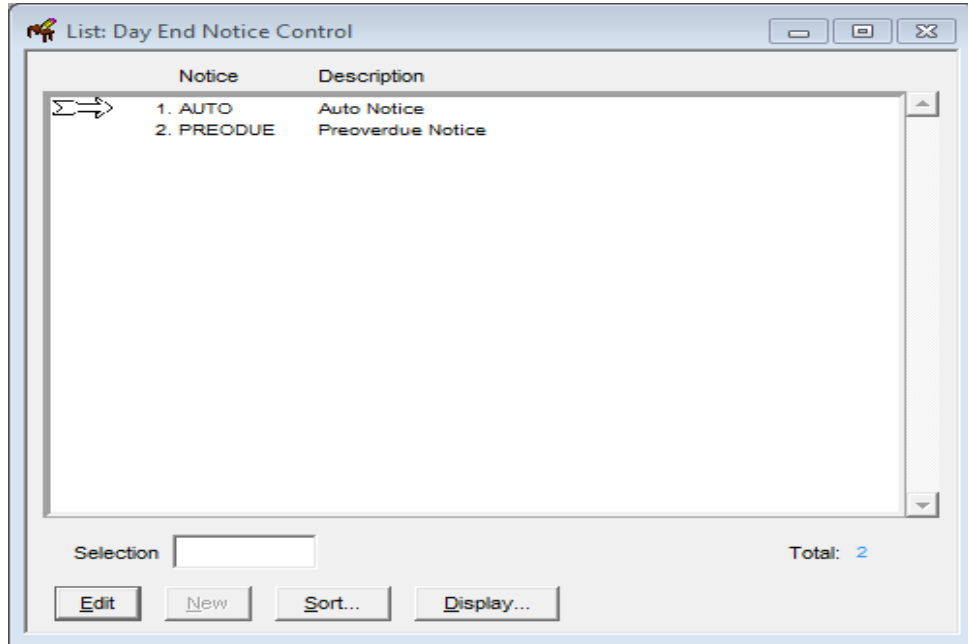
The process is added to the Day End processes.

6 Start the **Table Editor** process again.

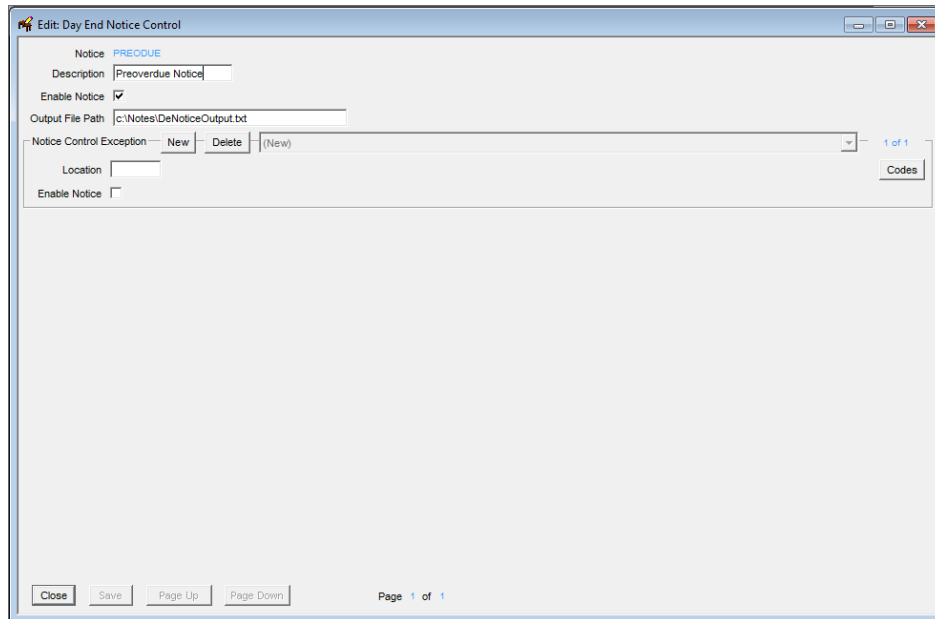
Horizon displays the Code Lookup Horizon View window.

7 Open the **de_ntc_ctl** view.

Horizon displays the List: Day End Notice Control window.



- 8 Double-click the **PREODUE** option.
- 9 Horizon displays the Edit: Day End Notice Control window.



- 10 Complete these fields and options:

Field	Description
Description	Enter or edit the name of the automatic notice process.

Field	Description
Enable Notice	Check the Enable Notices check box to configure Horizon to generate notices automatically for all locations. Leave the Enable Notices check box unchecked to configure Horizon to not generate the notices automatically for all locations.
Output File Path	Enter the file path to where Horizon should write the email notices batch file. Horizon automatically uses this file to send the generated email notices.
Exceptions	<ol style="list-style-type: none"> 1. In the Location field, enter the location for which you want to apply the exception. 2. Check the Enable Notices check box to configure Horizon to generate notices automatically for the specified location. Leave the Enable Notices check box unchecked to configure Horizon to not generate the notices automatically.

11 Click **Save** to save the configuration, then click **Close**.

Pre-overdue notices will now be generated and sent automatically as part of the Day End processes.

Printing a Single Invoice

You can reprint old invoices or print new invoices for fees assessed for the current borrower. You can also print a single reminder invoice for a borrower regardless of the reminder invoice delay set up by your system administrator.

To print a single invoice

- 1 In the Checkout window, identify the borrower.
- 2 Do one of these options:

To do this	Do this
Print a single new invoice	<ol style="list-style-type: none"> 1. Choose Blocks, Print New Invoice. Horizon either displays a message that no new fees have been accrued, or tells you the amount of the new invoice. 2. Click OK.
Reprint a single old invoice	<ol style="list-style-type: none"> 1. Choose Blocks, Reprint Old Invoice. Horizon displays a list of previously printed invoices. 2. Double-click the invoice you want to reprint.
Print a single reminder invoice	<ol style="list-style-type: none"> 1. Choose Blocks, Print Reminder Invoice. Horizon tells you if there are no invoiced amounts pending for the borrower. 2. Click OK.

Horizon prints the invoice.

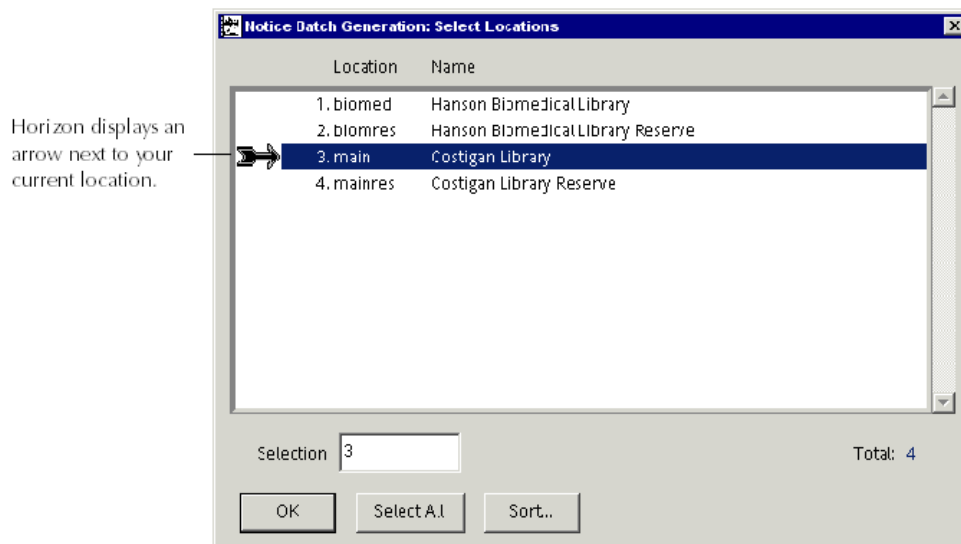
Printing Notices for Multiple Locations

You can generate and print notices for multiple locations at the same time.

To print notices for multiple locations

- 1 Complete the task [Printing or E-mailing a Batch of Notices, Invoices, or Reminders](#) on page 109.

After you choose the notice type that you want to print, Horizon displays the Notice Batch Generation Select Locations window:



- 2 Choose the locations for which you want to print notices.
- 3 Click **OK**.

Horizon displays a progress bar that shows you which locations are generating notices. Then, Horizon displays the List Notice Batch List with the new batch displayed as the latest entry.

- 4 Continue with step 6 in [Printing or E-mailing a Batch of Notices, Invoices, or Reminders](#) on page 109.

Sending a General SMS Message

You can send general messages to a specific borrower if the borrower has supplied a phone number with a type that is enabled for SMS and if the borrower has opted-in to receive general messages.

To send an SMS General Message

- 1 Open the Horizon client and log in.

2 Go to the **Circulation** area on the navigation bar.

3 Double-click the **Send SMS Message** option.

The Search - Borrowers dialog box displays.

4 Select the type of index to use for searching for a borrower to send the general message to and then type a value for the **Search for** field.

For example, select the Borrower Last Name Alphabetical index and type at least the first letter of the borrower's last name.

5 Click **OK** to start the search.

6 In the resulting list, select the borrower who you want to send the message to and click **OK**.

Note: If the borrower does not have any SMS enabled phone numbers or has not opted-in for general messages, an error message displays. To correct this, open the borrower record and supply the required information.

7 In the resulting list, select the specific borrower to send the message to, based on the borrower barcode, and click **Edit**.

Note: If the borrower has multiple barcodes, each one displays in the list.

8 In the dialog box, type the **Message** text to send to the borrower and click **Send**.

Important: If your message text is longer than 160 characters, the SMS server splits the message into 2 or more messages. This would double (or more) the number of messages that are sent and that the library is charged for.

9 Click **Close** to return to the borrower list.

Chapter 6: Borrower and item records

This chapter explains how to add, edit, and delete borrower records. It includes information about using proxy borrowers and replacing borrower barcodes.

This chapter also explains how to fast-add item and bib records and edit item information. It also includes information on using the Item Group Editor-Status Only process and on printing a borrower release document.

This chapter contains these topics:

- [About Borrower and Item Records](#) on page 125
- [Managing Borrower Records](#) on page 126
- [Replacing a Lost or Damaged Barcode](#) on page 150
- [Setting Up a Proxy Borrower](#) on page 151
- [Managing Item Records](#) on page 152
- [Changing Item Statuses](#) on page 158
- [Printing a Borrower Release Document](#) on page 166

About Borrower and Item Records

Borrower records contain information about all borrowers who are registered to use the library. This can include borrowers at affiliated or branch libraries. Horizon lets you set up your library so that borrowers whose main account is at a branch library can use library resources in other locations.

In general, the borrower record contains this information:

- Borrower type.
- Borrower address.
- Borrower's barcode.
- Additional information for tracking borrower activity.

Your system administrator sets defaults that affect how Horizon uses borrower records. (For example, the system administrator sets Circulation to ask for an address check after a specified amount of time, or to let a borrower's registration expire periodically, so that updated information can be added to a borrower record.) You can add new fields and change fields on a borrower record. You can also change or replace the barcode on a borrower's record and card, and set up proxy borrowers if the borrower wants to let others use his or her library account.

During checkout or checkin, you can edit certain item information (such as barcode, due date, or due time) or add notes to the item record for items that the borrower has checked out. If you want to change the item status for several items at once, you can use the Item Group Editor-Status Only process.

Managing Borrower Records

You add a new borrower to your circulation database by creating a borrower record. You can create the record from scratch, copy an existing record, or “fast-add” a borrower by completing an abbreviated form. You can edit a record, renew it, or delete it when you no longer need it.

This section explains these topics:

- [Adding a New Borrower Record](#) on page 126
- [Adding a New Borrower to a Shared Borrower Database](#) on page 131
- [Fast-Adding a Borrower Record](#) on page 132
- [Copying a Borrower Record](#) on page 135
- [About Borrower and Item Records](#) on page 125
- [Deleting a Borrower Record](#) on page 144
- [Renewing a Borrower’s Registration](#) on page 145
- [Viewing a Borrower’s Circulation History](#) on page 145
- [Adding or Editing a Borrower Photo](#) on page 146

Adding a New Borrower Record

You can add new borrowers to Circulation by adding a new borrower record. You can collect information from potential borrowers on a form and add several borrowers to your database at once. You can also collect information from a borrower in person and add them as a borrower when they are checking out.

If the borrower is in a hurry, or if you have a crowd of borrowers waiting for help, you can add just the necessary information for circulation purposes. This is called Borrower Fast Add. You can later edit the new borrower record and add remaining information to complete the record. (For more information, see [Fast-Adding a Borrower Record](#) on page 132.)

When adding a new borrower, Horizon allows you to check for a duplicate borrower. Horizon will run a check for any matching information such as name, phone number, address or email. Depending on how your library has it set up, Horizon will either automatically check for duplicates after you click Save or display a Check for Duplicates button before you choose Save. If you choose Save before checking for duplicates, Horizon can no longer check for duplicates because the record would then already exist in the system. For information about detecting duplicate borrowers, see [Avoiding Duplicate Borrower Records](#) on page 135.

To add a new borrower record

- 1 Open the Checkout or the Checkin/Request Processing window.
- 2 Choose **Borrower, New Borrower**.

Horizon displays a blank Edit New Borrower window:

- 3 Complete these fields:

Field	Action
BType	Enter or choose the code for a valid borrower type. The BTYPE determines the borrower circulation privileges, such as loan period, fine rate, and whether fines are charged for closed days.
Exp. Date	If needed, edit the expiration date. When you assign a location in the Location field, the date that the borrower's registration expires displays automatically in the Exp. Date field. However, you can change the date. (For example, if the borrower is a visiting professor who is local for only a short time, you can enter the professor's departure date here.)
Location	Enter or choose the code for the location where the borrower is a patron.
Name	Enter the borrower's last name, then first name.

Field	Action
ID	Enter a second ID for the borrower. This ID could be a social security number or e-mail alias. (Your library determines what the ID should be.) The ID becomes an alternate way to search for and identify a borrower.
Phone and Type	Enter one or more phone numbers for the borrower. For each phone number you enter, you must enter or choose the code for a corresponding type, such as home or work.
Barcode	Enter one or more barcodes for the borrower.

- 4 Click **Page Down** or resize the window to display the Addresses group:

- 5 Complete these fields:

- 6 Click **Page Down** or resize the window to display these fields:

The screenshot shows a window titled "Edit: New Borrower". At the top, there are two input fields: "Pin#" and "Language". To the right of these fields is a button labeled "Codes". At the bottom of the window, there is a row of buttons: "Close", "Save", "Duplicate", "Page Up", and "Page Down". To the right of these buttons, it says "Page 3 of 5".

7 Complete these fields:

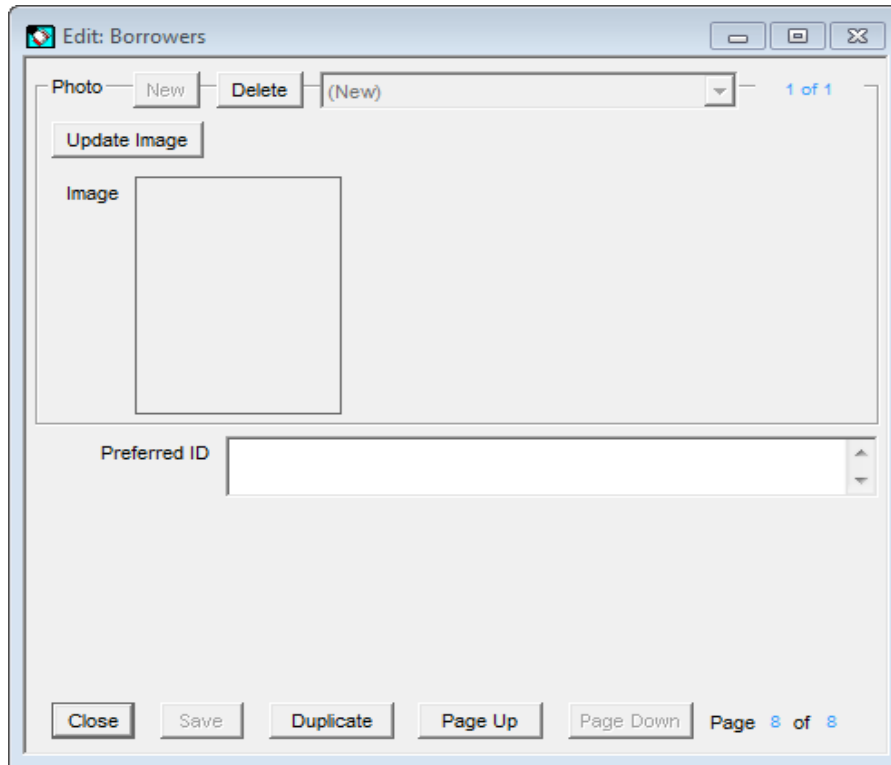
Field	Action
Pin#	If the borrower needs a special code to access some of your library's features, such as remote access, enter the code or pin number here.
Language	If the borrower primarily speaks another language, you can enter or choose the code for that information here.

8 Click **Page Down** or resize the window to display the PAC Access Type group:

The screenshot shows the same window, but now displaying the "PAC Access Type" group. At the top of this group, there are buttons for "New" and "Delete", followed by a dropdown menu showing "(New)" and "1 of 1". Below this is an "Access Type" input field and a "Codes" button. Underneath, there are two checkboxes: "Approved" (checked) and "Self-Registered" (set to "No"). At the bottom, the same row of buttons is visible, but now it says "Page 5 of 5".

9 If you have defined flavors for PAC, enter or choose the code for the borrower access type in the **Access Type** field.

10 Click **Page Down** or resize the window to display the Photo group:



11 If desired, add a photo to the borrower's record by clicking Update Image. For more information on how to add or edit a borrower photo image, see [Adding or Editing a Borrower Photo](#) on page 146.

12 If the borrower requests, complete this field:

Field	Action
Preferred ID	<p>The borrower can choose a custom username to assign to their account. The username must be at least eight characters in length and must be unique.</p> <p>For security, after you enter the Preferred ID, it will be masked and will not be revealed through Horizon. It is stored in Horizon as an encoded string. You can change the Preferred ID for the borrower but will not be able to tell them what their Preferred ID is.</p>

13 Save your changes.

Note: If your location has enabled Borrower Duplication Alerts, the Duplicate Borrower window may open if key fields match an existing borrower record. For more information about duplicate borrower records, see [Avoiding Duplicate Borrower Records](#) on page 135.

Horizon displays the borrower's name in the Checkout window.

Adding a New Borrower to a Shared Borrower Database

If your library is a member of a consortium, the member libraries may share borrower information from a single shared database rather than copying borrower information to the local database of each library. The Shared Borrower database resides on a single server to which all consortium libraries connect. You can share a borrower database only if each member library's bibliographic database resides on the same server as the Shared Borrower database. However, each library's bibliographic database can be maintained separately.



To set up a Shared Borrower database, contact your Horizon implementation team.

When your library uses a Shared Borrower database, Horizon automatically assigns a shared borrower type (Shared BType) to each borrower record created by any member library. You can identify patrons of consortium libraries by their shared borrower type location when they borrow from libraries other than their own. The libraries who share the borrower database set up parameters for the shared borrower type, including its name.

In addition to the shared borrower location, each borrower record includes a local borrower type (Local BType). The library that the borrower uses most often can create a local borrower type that establishes general circulation rules for that borrower for their library.

If a borrower is not a primary user in your library, you can override the circulation parameters defined by the shared BTYPE. You do this by assigning a local BTYPE of your own that establishes general circulation rules for that borrower for your library. (For more information, see “Defining a Borrower Circulation Type [BTYPE]” in the “Setting Up Horizon to Work with Borrower Records” section of the *Circulation Setup Guide*.)

To add a new borrower to a Shared Borrower database

- 1 Open the Checkout or the Checkin/Request Processing window.
- 2 Choose **Borrower, New Borrower**.

Horizon displays an Edit New Borrower window:

Horizon adds the non-editable Shared BType field to the shared borrower database.

The Local Btype group identifies the new borrower in the local database.

- 3 Enter the information appropriate to your customized window. (For instructions, see the tables of borrower record fields in [Adding a New Borrower Record on page 126](#).)

Note: If your library has customized the Edit New Borrower window, the fields may appear in a different order or have different labels. Enter the information appropriate to your customized window using the tables as a general guide.

- 4 Save your changes.

Horizon displays the borrower's name in the Checkout window.

Fast-Adding a Borrower Record

If you want to quickly add a new borrower to the Circulation database during checkout, you can fast-add a borrower record. You fast-add a new borrower to the database by opening and completing a short version of a borrower record. You can later edit the record to complete the borrower's record, or delete it if the borrower is not a long-term user of the library. (For more information, see [Adding a New Borrower Record on page 126](#) and [About Borrower and Item Records on page 125](#).) The type of information you must enter in fast-added borrower records is determined in the borrower_fast view of the Table Editor. (For more information, see "Requiring Fields for Fast-Added Borrower Records" in the "Preparing Horizon to Work with Borrower Records" section of the *Circulation Setup Guide*.)

When adding a new borrower, Horizon allows you to check for a duplicate borrower. Horizon will run a check for any matching information such as name, phone number, address or email. Depending on how your library has it set up, Horizon will either automatically check for duplicates after you click Save or display a Check for Duplicates button before you click Save. For more information, see "Setting Up the Duplicate Borrower Alert" in the *Circulation Setup Guide*.

To fast-add a borrower record

- 1 Open the Checkout or the Checkin/Request Processing window.
- 2 Choose **Borrower, New Borrower**.

Horizon displays a blank Edit New Borrower window:

- 3 Complete these fields:

Field	Action
BType	Enter the borrower type. (Click Codes for a list of valid BTYPEs.) The BTYPE determines the borrower's circulation privileges, such as loan period, fine rate, and whether fines are charged for closed days.
Exp. Date	An Exp. Date—the date the borrower's registration expires—automatically displays when you assign a location, but you may want to change it to an earlier date. (For example, if the borrower is a visiting professor who is local for only a short time, you can enter the professor's departure date here.)
Location	Enter the location where the borrower is a patron. (Click Codes for a list of valid locations.)
Name	Enter the borrower's last name, then first name.

Note: While the location, BType, Exp. Date, and Name fields are the only fields Horizon requires to create a borrower record, you can add as much information as you want before saving the borrower record. (For instructions, see [Adding a New Borrower Record on page 126](#).)

- 4 Save your changes.

Horizon displays the borrower's name and type in the Borrower display field of the Checkout window.

Note: If your location has enabled Borrower Duplication Alerts, the Duplicate Borrower window may open if the key fields match an existing borrower record. For more information about duplicate borrower records, see [Avoiding Duplicate Borrower Records](#) on page 135.

- 5 If you want a reminder to complete or delete the fast-added borrower record when the items he or she borrows are returned, add a note block to the record. To do this, follow these steps:

- a Choose **Blocks, Add Note**.

- b Do one of these:

- If Horizon displays the Edit Current Blocks window, skip to step 3 in this table.
- If Horizon displays the Code Look-up Block Types window, double-click the type of note block you want to add.

Horizon opens the Edit Current Blocks window

- c Enter a comment in the **Comment** field.

- d Mark the appropriate **Action** button.

This determines what type of action Circulation takes with the block. There are three action types:

- **None.** Horizon takes no action on the block.
- **Print.** Horizon prints a notice or creates an e-mail message about the block to send to the borrower.
- **Review.** Horizon adds the block to the Notice Review list. This lets the circulation staff review the matter to see if any other action is needed.

(For more information, see [Editing the Action Setting for Notices in the Notices for Review List](#) on page 108.)

- e Click **OK**.

Horizon closes the Edit Current Blocks window and displays the Current Blocks window for the borrower. The newly-added note block is on the list.

- f Click **Close**.

Horizon returns to the Checkout window with the borrower's name displayed ready for checkout.

- 6 Proceed with a normal checkout. (For instructions, see [Checking Out an Item Normally](#) on page 18.)

Copying a Borrower Record

You can copy an existing borrower record. When you do this, Horizon imports information in specific fields to the new borrower record. You can copy a borrower record from an existing borrower record, or from a borrower record that you are currently creating. When you duplicate a borrower record, Horizon duplicates the record that is currently active.

Being able to copy an existing record and import information from certain fields lets you more quickly create new borrower records for borrowers whose general borrower information may be the same. (For example, you can more easily create new borrower records for members of the same family who may have the same address and telephone number.)

Your system administrator can choose the fields from which Horizon imports information. (For instructions, see “Choosing Fields for Copied Borrower Records” in the “Preparing Horizon to Work with Borrower Records” section of the *Circulation Setup Guide*.)

To copy a borrower record

1 Do one of these options:

- Find the borrower record you want to duplicate.
- Create a new borrower record.

(For instructions, see [Adding a New Borrower Record](#) on page 126 or [Fast-Adding a Borrower Record](#) on page 132.)

2 Click **Duplicate**.

Horizon displays the duplicate borrower record and imports information in specific fields from the original borrower record.

Note: If your location has enabled Borrower Duplication Alerts, the Duplicate Borrower window may open if enough key fields match the original borrower record. For more information about duplicate borrower records, see [Avoiding Duplicate Borrower Records](#) on page 135.

Avoiding Duplicate Borrower Records

The duplicate borrower check lets you verify that the new borrower record does not already exist in the database. You can set up duplicate borrower alerts to check specific fields for matching values (for more information, see “Setting up the Duplicate Borrower Alert” in the *Circulation Setup Guide*). If a borrower record matches a selected field or combination of fields, Horizon lists the matching records and lets you determine whether they actually match. You can then either cancel the new record, revise the new record, or save it as it is with the matching fields.

For more information, see these topics:

- [Working with Automatic Duplicate Borrower Verification](#) on page 136
- [Checking for a Duplicate Borrower](#) on page 137

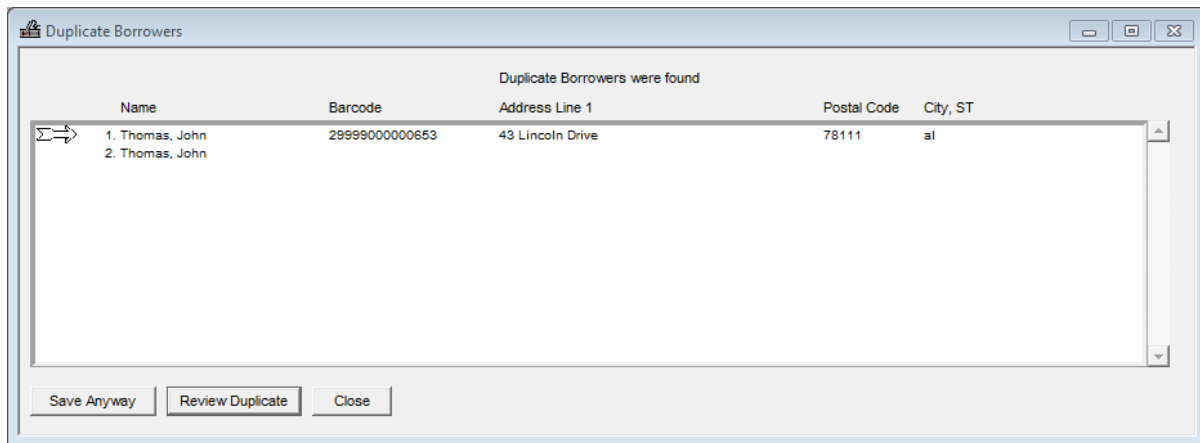
Working with Automatic Duplicate Borrower Verification

If your location has the Borrower Duplication Alert enabled, Horizon will either automatically check for duplicates when you save the record or let you manually use the Check For Duplicates option in the Edit: New Borrower window.

To verify automatically flagged duplicate borrowers

- 1 Add a new borrower record. See [Copying a Borrower Record on page 135](#).

When you save the new record, Horizon checks to see if any other borrower records match the new record. If another record matches the criteria specified in the Borrower Duplication Alert, the Duplicate Borrowers window opens.



This window lists the borrowers that match the duplication criteria specified in the Borrower Duplication Alert selected for your location.

- 2 To view the details of a borrower in the list, select the borrower, then choose **Review Duplicate**.

The Edit: Borrower window opens.

The screenshot shows a web application window titled "Edit: Borrowers". The window contains the following information:

- Borrower #**: 65
- Regist. Date**: 02/01/2002
- Last Updated**: 04/26/2016
- No. of CKOs**: 71
- Last CKO Date**: 02/01/2002
- Location**: north (North Branch)
- BType**: sta (Administrative Staff)
- Homeroom**: (empty)
- Exp. Date**: 02/01/2003
- Name**: Thomas, John
- Alt. ID**: 123065
- Birthdate**: 02/28/1965
- Borrower Note**: (empty text area)
- Phone**: 971-26-6099 (Type: h, Home)
- Country Code**: (empty)
- SMS Notice PreOverdues**: N
- Overdue**: N
- Hold**: N
- General**: N

At the bottom of the window, there are buttons for "Close", "Save", "Duplicate", "Page Up", "Page Down", and "Page 1 of 6".

You can view the details of the borrower record, but you cannot make changes to the record.

- 3 Determine whether the borrower in this record is the same as the borrower for whom you are creating the new record.
- 4 When you have finished, close the borrower record.
- 5 Do one of the following:
 - If the new borrower record is a duplicate of an existing record, close the Duplicate Borrowers window, then either close the Edit: New Borrower window without saving or edit the record so it does not match the duplicate record.
 - To save the new record that matches the existing record, choose **Save Anyway**.

Checking for a Duplicate Borrower

If your location has enabled duplicate borrower checking, but has not made the check automatic, you can check for duplicate borrower records when you create or copy borrower records.

To check if a duplicate borrower record already exists

- 1 Add a new borrower record. See [Copying a Borrower Record](#) on page 135.

- 2 Before saving the record, choose **Check For Duplicates**.

Horizon opens the Duplicate Borrowers window, which lists any of the borrower records that match the fields selected for the Borrower Duplication Alert:

Duplicate Borrowers were found				
Name	Barcode	Address Line 1	Postal Code	City, ST
1. Thomas, John	2999900000653	43 Lincoln Drive	78111	al

This window lists the borrowers that match the duplication criteria specified in the Borrower Duplication Alert selected for your location.

- 3 To view the details of a borrower in the list, select the borrower, then choose **Review Duplicate**.

The Edit: Borrower window opens.

The screenshot shows a window titled "Edit: Borrowers" with the following fields and values:

- Borrower # 65
- Regist. Date 02/01/2002
- Last Updated 04/26/2016
- No. of CKOs 71
- Last CKO Date 02/01/2002
- Location north (North Branch)
- BType sta (Administrative Staff)
- Homerom
- Exp. Date 02/01/2003
- Name Thomas, John
- Alt. ID 123065
- Birthdate 02/28/1965
- Borrower Note (empty text area)
- Phone: 971-26-6099 (Type: h, Home)
- Country Code
- SMS Notice PreOverdues N
- Overdue N
- Hold N
- General N

At the bottom of the window are buttons for "Close", "Save", "Duplicate", "Page Up", "Page Down", and "Page 1 of 6".

You can view the details of the borrower record, but you cannot make changes to the record.

- 4 Determine whether the borrower in this record is the same as the borrower for whom you are creating the new record.
- 5 When you have finished, close the Borrower window and the Duplicate Borrowers window.

Editing a Borrower Record

You can edit existing borrower information in the Edit Borrower window. (For example, if a borrower changes telephone numbers, you can replace the old one with the new one.) You can also enter additional borrower information to make the borrower record more complete. (For example, if you fast-add a borrower at the time of checkout but have a registration card with more information on it, you can enter the rest of the information at a later date.)

When editing a borrower, Horizon allows you to check for a duplicate borrower. Horizon will run a check for any matching information such as name, phone number, address or email. Depending on how your library has it set up, Horizon will either automatically check for duplicates after you click Save or display a Check for Duplicates button before you click Save. For more information, see "Setting Up the Duplicate Borrower Alert" in the *Circulation Setup Guide*.

To edit a borrower record

- 1 In the Checkout window, identify the borrower.
- 2 Choose **Borrower, Edit Borrower**.

Here is an example of an Edit Borrower window:

The screenshot shows a window titled "Edit: Borrowers" with the following fields and values:

- Borrower #: 49
- Regist. Date: 09/24/1997
- Last Updated: 02/15/2002
- No. of CKOs: 40
- Last CKO Date: 01/01/1970
- Location: north (North Branch)
- BType: civ (Civilian Personnel)
- Exp. Date: 06/24/2004
- Name: Nelson, Horatio
- ID: 123049
- Birthdate: 09/06/1957
- Note: (empty)
- Phone: 971-266-4013 (Type: h - Home)

Buttons at the bottom include: Close, Save, Duplicate, Page Up, Page Down, and Page 1 of 6.

- 3 Edit these fields as needed:

Field	Action
Location	Enter or choose the code for the location where the borrower is a patron.
BType	Enter the borrower type (BTYPE). (Click Codes for a list of valid BTYPEs.) The BTYPE determines the borrower circulation privileges, such as loan period, fine rate, and whether fines are charged for closed days.
Exp. Date	Enter the date the borrower's library privileges will expire unless they are renewed.
Name	Enter the borrower's last name, then first name.
ID	Enter a second ID for the borrower. This ID could be a social security number or e-mail alias. (Your library determines what the ID should be.) The ID becomes an alternative way to search for and identify a borrower.
Birthdate	Enter the birth date of the borrower.

Field	Action
Note	Enter any notes about the borrower.
Phone and Type	Enter one or more phone numbers for the borrower. For each phone number you enter, you must enter or choose the code for a corresponding type, such as home or work.

- 4 Click **Page Down** or resize the window to display the Addresses group:

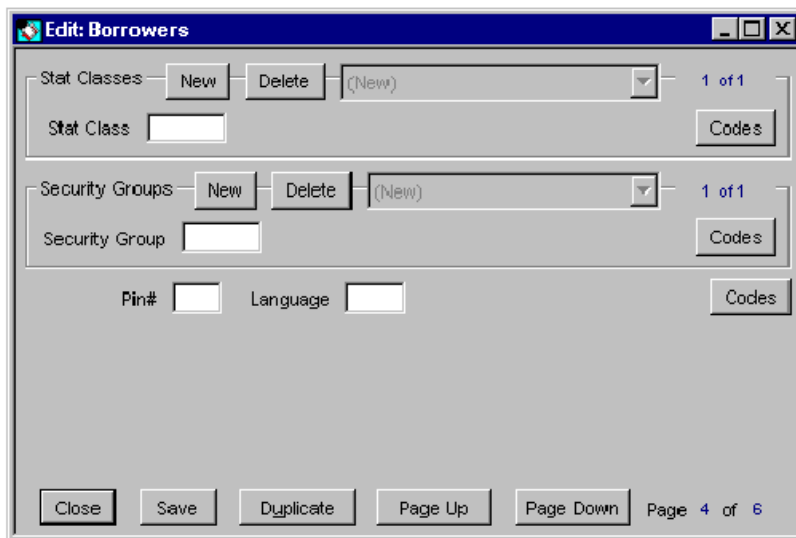
- 5 Edit these fields as needed:

- 6 Click **Page Down** or resize the window to display these fields:

- 7 Edit these fields as needed:

Field	Action
Barcode (in the Barcodes group)	Enter one or more barcodes for the borrower. (If you are replacing a lost or damaged barcode, see Replacing a Lost or Damaged Barcode on page 150.)
Barcode (in the Proxy group)	Enter one or more barcodes for borrowers who can check out items on behalf of the current borrower. (Click Find Borrower to open a search window to search for and add proxy borrowers.) Proxy borrowers might include student assistants, research assistants, or administrative assistants. (For more information, see Setting Up a Proxy Borrower on page 151.)

8 Click **Page Down** or resize the window to display these fields:

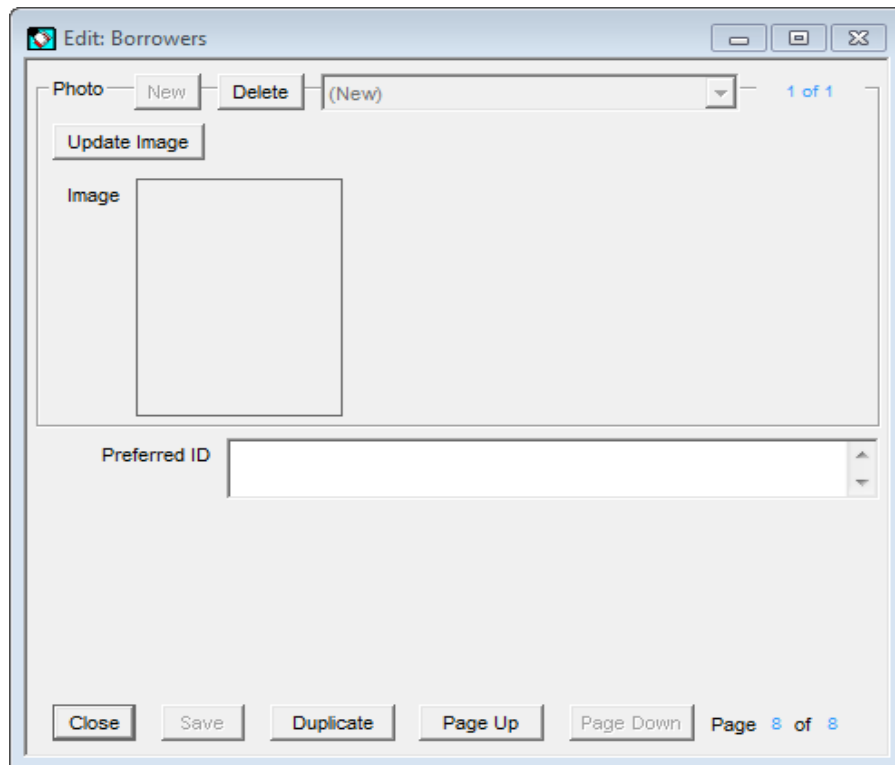


9 Edit these fields as needed:

Field	Action
Stat Class	Enter the borrower’s statistical classes, which are library-defined categories. (Click Codes for a list of valid stat classes.) You use the statistical class to collect circulation statistics.
Security Group	Enter the borrower’s security groups, which are library-defined categories. (Click Codes for a list of valid security groups.) You use security groups to secure bib records so that only those borrowers belonging to certain security groups can view selected bib records.

Field	Action
Pin#	If the borrower needs a special code to access some of your library's features, such as remote access, enter the code or pin number here.
Language	If the borrower primarily speaks another language, you can enter or choose the code for that information here.

- 10 Click **Page Down** or resize the window to display the PAC Access Type group.
- 11 If you have defined flavors for PAC, enter or choose the code for the borrower access type.
- 12 Click **Page Down** or resize the window to display the Photo group:



- 13 If desired, add a photo to the borrower's record or change the existing photo by clicking Update Image. For more information on how to add or edit a borrower photo image, see [Adding or Editing a Borrower Photo](#) on page 146.
- 14 If the borrower requests, complete this field:

Field	Action
Preferred ID	<p>The borrower can choose a custom username to assign to their account. The username must be at least eight characters in length and must be unique.</p> <p>For security, after you enter the Preferred ID, it will be masked and will not be revealed through Horizon. It is stored in Horizon as an encoded string. You can change the Preferred ID for the borrower but will not be able to tell them what their Preferred ID is.</p>

15 Save your changes.

School Library Fields in Borrower Record

When editing a borrower record in release 7.4 or later, you may see additional fields in the Edit Borrower window, such as parent/guardian, teacher, and grade, as well as several class schedule fields. These extra fields are intended for use by public school libraries. You may not want these fields display in the borrower record.

You can easily hide these additional fields from appearing in the Edit Borrower window.

To hide additional fields

- 1 Open the **borrower** view in the Table Editor.
- 2 Display the **Edit View** group.
- 3 From the drop-down list, highlight and delete these columns:
 - parent_guardian
 - teacher
 - grade
- 4 Display the **Edit Links** group.
- 5 From the drop-down list, highlight and delete the class_schedule group.
- 6 Save your changes.

Deleting a Borrower Record

You can delete a borrower record if you no longer need it. However, make sure that all outstanding issues (items checked out to borrower, fines due, and so forth) are resolved first.

To delete a borrower record

- 1 In the Checkout window, identify the borrower.
- 2 Choose **Borrower, Edit Borrower**.

Horizon displays an Edit Borrower window containing the borrower's record.

3 Choose **Borrower, Delete Borrower**.

You are prompted to confirm the deletion.

4 Click **OK**.

Horizon deletes the record and returns to an empty Checkout window.

Renewing a Borrower's Registration

Your system administrator can set a time period after which borrower records need to be renewed. When the time period is reached, Horizon prompts you to renew the borrower's registration. You have the option to proceed with the renewal, cancel the checkout and renewal procedure, or override the renewal procedure and continue with checkout. If you override the renewal prompt, Horizon prompts for renewal the next time you identify the borrower.



You can renew a borrower's registration before the expiration date. (For instructions, see [About Borrower and Item Records on page 125](#).)

You can use two methods to renew a borrower's registration:

- **Automatic.** Periodically Horizon prompts you to update the registration. The period between renewals is determined by library policy and is set by your system administrator as part of each borrower's BTYPE.
- **Manual.** At any time you can open a borrower's record and change the expiration date. (For more information, see [About Borrower and Item Records on page 125](#).)

To renew a borrower's registration

1 In the Checkout window, identify the borrower.

If the borrower's registration has expired, Horizon displays an Expire Library Registration window.

2 Click **Renew**.

Horizon displays the Edit Renew Registration window.

3 Update any information that has changed. (For example, you can verify the borrower's address and phone number.)

4 Save your changes.

Circulation renews the borrower's registration and returns you to the Checkout window with the borrower's name displayed. You can proceed with checkout procedures.

Viewing a Borrower's Circulation History

Horizon Information Portal 4.0 lets you keep a borrower's circulation history. If your library chooses to keep this history, you can view it in the Edit Borrower window.



You can choose to add more MARC mapped columns, or other item type columns to display information in the Circ History group in the borrower record.

You can view these parts of a borrower's circulation history:

- Item #
- Barcode
- Title
- Checkout date
- Checkout time
- Checkout location
- Call number
- Collection

To view a borrower's circulation history

- 1 Open the Edit Borrower window for the borrower whose circulation history you want to view.
- 2 Display the **Circ History** group.
- 3 View the borrower's circulation information in this group.

Adding or Editing a Borrower Photo

You can add a photo of the borrower to a borrower's record. You can use an image that has been saved to the workstation or an image you capture with a webcam device connected to the workstation. Using this process, you can also replace an existing photo image with another image.

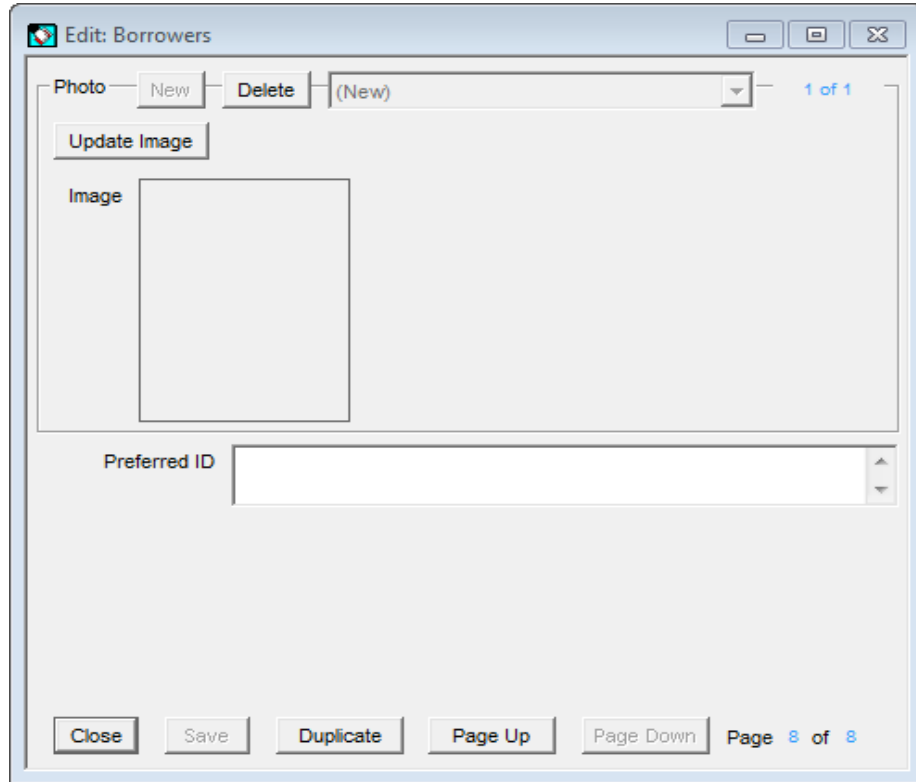
Borrower photos display in the CKO window and within the borrower record.



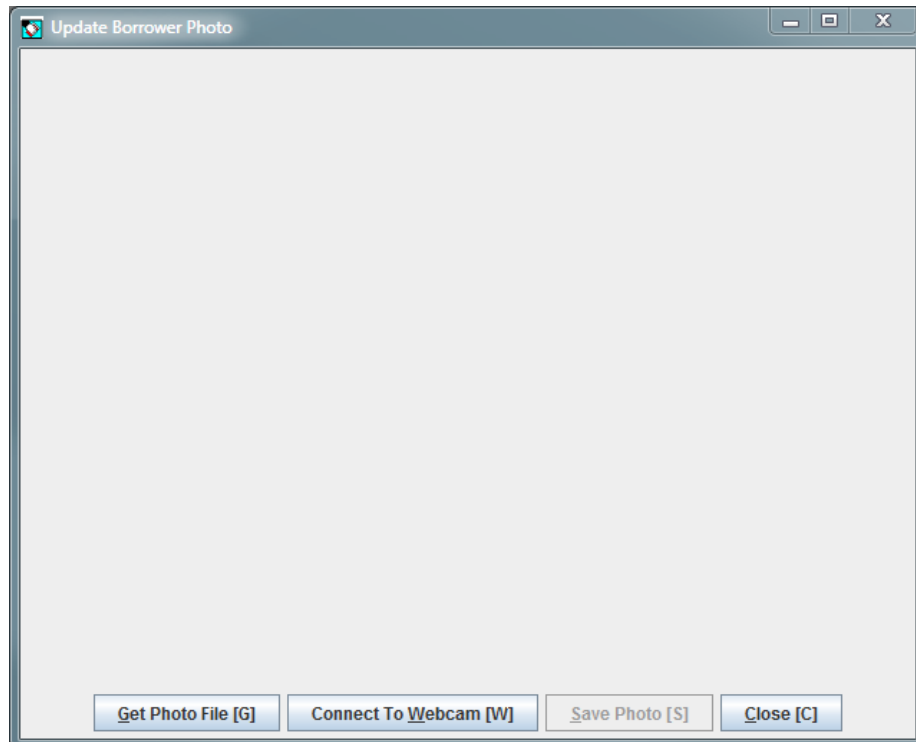
Borrower photos do not display in the CKO window if an administrator has configured them to not appear, or if a user has chosen the Hide Borrower Photo option in the CKO menu. Administrators can choose to hide borrower photos on the basis of BTYPE or for the entire library. The Hide Borrower Photo option only affects that user's specific workstation and hides all borrower photos regardless of the borrower's BTYPE.

To add or edit a borrower photo

- 1 Open the borrower's record and click **Page Down** until you see the Photo group.



- 2 Click **Update Image**. The Update Borrower Photo window opens.



- 3 Use one of the following procedures to obtain the photo image:

- **To load an image from a file** on page 148
- **To capture and save an image from a webcam** on page 149



The webcam functionality is not supported if your Horizon server is hosted in a Citrix environment. If your Horizon server is hosted within a Citrix environment, use an external application, such as AMCap or Google Picasa™, to capture photos with a webcam. Users can then load the externally-created image file into Horizon for use in the borrower record.

To load an image from a file

- 1 Click **Get Photo File**.
- 2 Navigate to the image you want to load.
- 3 Select an image file and click **Open Photo**.

The image displays in the editor space.



- 4 Select the portion of the image you want to use. You can click and drag the edge of the selection box to include more or less of the image, or you can click the **Square** check box to create a square selection area. Any portion of the image that is not selected is displayed in grayscale.
- 5 When you have selected the portion of the image you want to save, click **Save Photo**. Horizon crops, compresses, and saves the image to the borrower database.

Note: If your image selection is smaller than 100 by 100 pixels, Horizon will insert black space around the selection to make the resulting image fit in a 100 by 100 pixel space.

- 6 Click **Close** to close the Update Borrower Photo window.

The borrower's photo displays in the borrower record.

To capture and save an image from a webcam

- 1 Click **Connect to Webcam**. Clicking this button displays a window showing the capture view of the webcam.

Note: If there is no webcam connected to the workstation, this button does not appear.

- 2 Click **Capture** when the image you want displays in the capture view. The image you captured displays in the editor space.



- 3 Select the portion of the image you want to use. You can click and drag the edge of the selection box to include more or less of the image, or you can click the **Square** check box to create a square selection area. Any portion of the image that is not selected is displayed in grayscale.
- 4 When you have selected the portion of the image you want to save, click **Save Photo**. Horizon crops, compresses, and saves the image to the borrower database.

Note: If your image selection is smaller than 100 by 100 pixels, Horizon will insert black space around the selection to make the resulting image fit in a 100 by 100 pixel space.

- 5 Click **Close** to close the Update Borrower Photo window.

The borrower's photo displays in the borrower record.

Replacing a Lost or Damaged Barcode

You may need to replace a borrower's barcode. The borrower's card may have been lost, or the barcode may no longer be readable because it is worn or damaged. If a barcode is ever used after it is marked lost in Horizon—either by the original owner or by someone else—a message displays explaining that this barcode has been reported lost. If this happens, you can do one of these things:

- **Activate the lost barcode.** In this case the original owner would have two viable barcodes.
- **Cancel the circulation procedure.** In this case the lost barcode remains lost and unusable.
- **Delete one of the barcodes in the borrower record and destroy the card with the deleted barcode.** (If you recycle cards instead of destroying them, recycle the card.) In this case the original owner keeps only one viable barcode.

To replace a lost or damaged barcode

- 1 In the Checkout window, identify the borrower.
- 2 Choose **Borrower, Edit Borrower**.
Horizon displays the Edit Borrower window for the borrower.
- 3 Click **Page Down** or resize the window to display the Barcodes group.
- 4 In the **Date Lost** field of the Barcodes group, enter the date that the borrower reported the card lost.
- 5 Click **New** in the Barcodes group.
- 6 Enter the new barcode in the **Barcode** field.
- 7 Click **Save**.
- 8 Replace the barcode on the borrower's card with a new barcode, or replace the entire borrower's card, if necessary.
- 9 Click **Close**.

Horizon closes the Edit Borrower window and returns you to the Checkout window where you can proceed with checkout procedures. (For instructions, see [Checking In an Item on page 23](#).)

Setting Up a Proxy Borrower

The proxy borrower feature lets borrowers designate a proxy to check out library materials for them. (For example, faculty members can authorize a proxy such as a research assistant or secretary to check out library materials in their name.) An authorizing borrower may have multiple proxies.

When proxies are appointed, they are usually given a proxy library card or barcode to check out materials for their authorizing borrower. When proxies use the library, the circulation privileges pertaining to their authorizing borrower apply.



Proxy borrowers must exist as independent borrowers before they can be a proxy borrower. If there is no record for the borrower you want to use as a proxy, you must create one. (For instructions, see [Adding a New Borrower Record](#) on page 126.)

A proxy uses the proxy card or barcode when performing library transactions in the authorizing borrower's name. When using the library for personal use, the proxy uses his or her own card or barcode. (For example, the proxy may be a student with personal library privileges in addition to proxy privileges.)

When a proxy checks out materials for their authorizing borrower, the items checked out go on the authorizing borrower's record. Likewise, all notices go to the authorizing borrower, as do any pertaining blocks. Ultimately, the authorizing borrower is responsible for items checked out by their proxies.

Once you set up a proxy borrower, you can use basic checkout procedures for circulating items to proxy borrowers. (For instructions, see [Checking Out an Item](#) on page 18.)

You link proxies to an authorizing borrower in the authorizing borrower's record. You can link one or more proxies to a single authorizing borrower.

To set up a proxy borrower

1 In the Checkout window, identify the authorizing borrower.

2 Choose **Borrower, Edit Borrower**.

Horizon displays an Edit Borrower window containing the authorizing borrower's record.

3 **Page down** or resize the window to display the **Proxy Borr** group.

4 Do one of these options:

- If this is the first proxy borrower, skip to step 6.
- If this is a multiple group, click **New** in the Proxy Borr group.

5 Click **Find Borrower** in the Proxy Borr group.

Horizon displays the Search window.

6 Search for the proxy borrower.

When you find the proxy borrower, Horizon displays that borrower's number in the Proxy Borrower display field, the borrower's name in the Name display field, and the expiration date of the authorizing borrower's record in the Expire Date field.

- 7 Enter the barcode number that the borrower will use when checking out items as proxy.
- 8 Leave the **Date Lost** field blank unless the proxy borrower loses the card with the proxy barcode on it. (For instructions on replacing, see [Replacing a Lost or Damaged Barcode](#) on page 150.)
- 9 If you want to change the date that the proxy borrower's privileges as proxy expire, enter the new date in the **Date Expire** field.

Regardless of the expiration date you enter here, the proxy privileges end when the authorizing borrower's record expires. (For instructions on changing the authorizing borrower's record expiration date, see [About Borrower and Item Records](#) on page 125.)

- 10 Save your changes.
- 11 Repeat steps 5 through 10 for each proxy you want to add.

Managing Item Records

Once you have checked out or checked in items, you can view and edit the circulation information for that transaction from the Checkout or Checkin window.

If you want to check out or request an item which does not yet have an item record, you can "fast-add" an item to your circulation database by completing an abbreviated form.

You can edit barcodes on items, but should not edit non-standard barcodes on items that are in transit.

This section explains these topics:

- [Viewing and Editing Item Information in Checkout](#) on page 152
- [Viewing and Editing Item Information in Checkin](#) on page 155
- [Fast-Adding Item and Bib Records](#) on page 156
- [Editing Short, Non-Standard Barcodes on In-Transit Items](#) on page 158

Viewing and Editing Item Information in Checkout

If you want, you can view and edit certain circulation information for items that have been checked out. You can change the barcode number and the due date and time as well as add notes to the record. You can edit information for one item or several items (a "batch") at a time. However, you can change only the due date and time when you choose to do a batch edit.



You can also view item circulation statistics such as in-house use information. (For more information, see [Using Other Horizon Circulation Reporting Options](#) on page 173.)

To view and edit item information in Checkout

- 1 In the Checkout window, identify the borrower.
- 2 Click **All Items Out**.

Horizon displays a list of all the items currently checked out to the borrower.

- 3 Do one of these options:

- If you want to view and edit information for a single item, do these steps:
 - Highlight the item you want and click **Edit Item**.

Horizon displays the Edit Checkout window:

- You can edit this circulation information for the item:

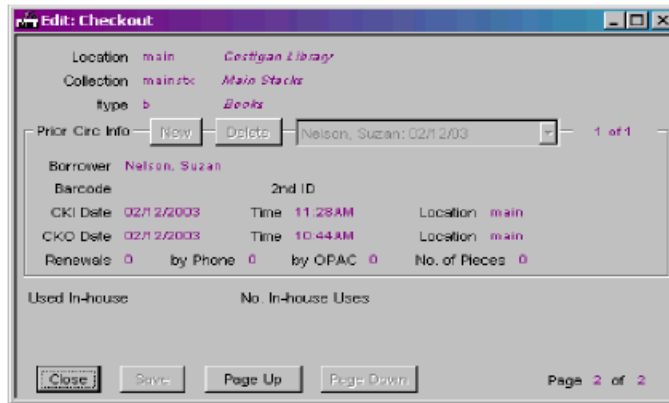
- **Barcode.** Edit the item's barcode, if necessary. (Item barcodes are usually edited in Cataloging.)
- **Due Date/Due Time.** Enter the new due date or time and mark the **AM** or **PM** button, as appropriate.

Note: You need to enter the century when you enter dates before the year 1908 and after the year 2007. (For example, if the date were 04-01-2003, you only need to enter "03" as the year.)

You can set an indefinite due date by entering a date beyond 12-31-2049. (For more information, see [Changing the Due Date or Time During Checkout](#) on page 20.)

- **Note.** Enter any information about the item. Horizon displays this note when the item is checked in.
- **Internal Note.** Enter any comments about this item, to be viewed by library staff.

- Click **Page Down** or resize the window to display additional circulation information about this item:



- If you want to view and edit due date or time information for multiple items, do these steps:

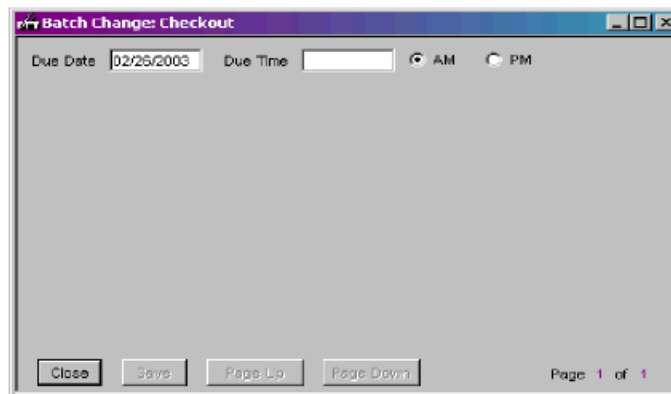
- Highlight the items you want to edit and click **Edit Item**.

Horizon displays the Batch change Message box:



- Click **OK** to make changes for the highlighted items.

Horizon displays the Batch Change Checkout window:



- Enter the new due date or time and mark the **AM** or **PM** button, as appropriate.

4 Save your changes.

Horizon returns to the Checkout window.

Viewing and Editing Item Information in Checkin

Once you have checked in an item, you can view and edit certain circulation information for the item. You can change the barcode number and the due date and time and add notes to the record.

To view and edit item information in Checkin

- 1 Check in the item.
- 2 Highlight the item you want in the list box and click **Edit Item**.

Horizon displays the Edit Checkin/Request Processing window:

The screenshot shows a window titled "Edit: Checkin/Request Processing". The window contains the following information:

- Title: *Costume and fashion : a concise history /*
- Location: *main Costigan Library*
- Collection: *mainstx Main Stacks*
- Call No.: *GT511 .L39 1995* Copy No. Item No. *1417*
- Status: *Shelving Cart*
- Status Updated: *02/12/2003*
- Notes: [Text input field]
- Barcode: *mq1921*
- Internal Note: [Text area]

At the bottom of the window, there are buttons for "Close", "Save", "Page Up", and "Page Down". The page number "Page 1 of 2" is displayed in the bottom right corner.

- 3 You can edit this circulation information for the item:
 - **Notes.** Enter any information about the item.
Horizon displays this note in the list box of the Checkin/Request Processing window with the item.
 - **Barcode.** Edit the item's barcode, if necessary. (Item barcodes are usually edited in Cataloging.)
 - **Internal Note.** Enter any comments about this item, to be viewed by library staff.
- 4 Click **Page Down** or resize the window to display additional circulation information about this item:

- 5 Save your changes.

Fast-Adding Item and Bib Records

Occasionally, a new or uncataloged item might slip past your cataloging staff and onto the shelves, or you may make an uncataloged item available for a borrower who needs information from that particular item. If a borrower wants to check out an uncataloged item, you can fast-add that item to Circulation as you check it out. Later, depending on your library's policy, the item record can be edited, or deleted so that a new one can be created in Cataloging. The type of information you must enter in fast-added item and bib records is determined in the `marc_usage` view. (For more information, see "Specifying Bib Information in Fast-Added Records" in the *Cataloging Setup Guide*.)

You can fast-add item records in two ways:

- **Item Record Only.** If a bib record already exists for the title, you can create just an item record. You should fast-add an item record only if a bib record for the title already exists in the database. In other words, if you have other copies of the same title, the general information (such as title and author) will already be in Horizon. You can search for the bib record that contains the general information and then fast-add an item record that contains information specific to the uncataloged copy.
- **Bib and Item Record.** If neither a bib nor an item record exists, you can fast-add both.

To fast-add item and bib records

- 1 In the Checkout window, identify the borrower who wants to check out the item that you need to fast-add.
- 2 Choose **Item, New Item**.

Horizon displays the Item Not Found/Fast Add dialog box:



3 Do one of these options:

If you want to do this	Do this
Create an item record	<ol style="list-style-type: none"> 1. Click Find Bib. 2. Search for the title until the title's Bibliographic Detail window displays. (For instructions, see "Doing a Basic Search" in the "Searching" chapter of the <i>Horizon Basics Guide</i>.) 3. Choose Edit, Send to/Edit Fast-Add. Horizon displays the Edit Fast-Add window with the correct title and author already entered.
Create a bib record <i>and</i> an item record	<ol style="list-style-type: none"> 1. Click Bib & Item. Horizon displays an Edit Fast-Add window for you to enter bibliographic and item data.

Here is an example of a blank Edit Fast Add window:

4 Complete these fields:

Field	Action
Author	<p>Enter the author's name.</p> <p>If you are fast-adding only an item, this field is filled in with the author from the bib record you found.</p>

Field	Action
ISBN/ISSN	Enter the numbers in the appropriate field, depending on which type of item you are fast-adding. If you are fast-adding only an item, this field is filled in with the bib information, if it exists.
Title	Enter the full title of the item. If you are fast-adding only an item, this field is filled in with the title from the bib record you found.
Location	Enter the code for the location where the item is housed. (Click Codes for a list of valid options.)

5 Click **OK**.

Horizon processes the fast-added record and checks the item out to the borrower. It also creates an item record for the copy and attaches it to the bib record.

Editing Short, Non-Standard Barcodes on In-Transit Items

Your library may occasionally use short non-standard item barcodes (those that are shorter than your system administrator has defined in the location view). If you modify and save any item barcodes on in-transit items, Horizon automatically pads or adds digits to equal the defined barcode length. When the items get to the new location, users or staff cannot search for them because the barcodes are invalid.

If you do *not* modify and save a barcode as you work with in-transit items, Horizon leaves short, non-standard barcodes as they are.

Changing Item Statuses

If you need to change only the status for a group of items, you can use the Item Group Editor–Status Only process. (For example, you may want to remove items from circulation that need repair. By creating an item group for the items, you can do a batch edit that will change the status to “Damaged” for all of those items at once instead of having to edit each individual item record.)



If you want to edit more than the status (for example, item type, location, call number and so forth) for a group of items, you need to use the main Item Group Editor. (For information on the main Item Group Editor, see the “**Using the Item Group Editor**” appendix of the *Circulation Guide*.)

You can change the item status for a group of items in two ways:

- **Create a formal group.** When you create a formal group, you choose the item records whose status you want to change and give the group a descriptive name. If you want to, you can keep a hard copy of the changes you make. (For example, using a spreadsheet, summarize the changes you made, why you made them, and

any other information you feel useful.) This is helpful in keeping track of your groups and the changes you make in their status.

- **Create an informal group.** You can also edit a group of items without creating a formal group. In this case, you just search for item records meeting your desired criteria, choose the items you want to edit, and then change their status in a batch edit. (For example, search for items with a status of “Newly Acquired,” choose those that have been sent to Cataloging, and change their status to “In Cataloging.”) You may still want to keep a hard copy of your changes, because Horizon does not store the group of items as a named group in the database.

Horizon lets you change only certain item statuses. This prevents you from inadvertently bypassing circulation processes that trigger other necessary circulation operations.

For example, when you want to return a group of items to circulation, you must check the items individually, rather than group changing the item status to “Checked In.” This triggers certain circulation operations (such as fulfilling hold requests) and helps you keep track of each item’s current status instead of just replacing it with a status that may no longer be valid.



Do not attempt any direct update of the item status using SQL. Unless you know exactly what you are doing, you stand a very good chance of corrupting your database. For example, changing an item’s status from “o” to “i” will orphan data in the circ table, bypass any fines calculations if the item is overdue, leave rows in the recall table, leave unresolved blocks on the borrowers, and ignore any pending requests.

Other item status values can have similar problems.

Here are the item statuses to which you can change:

- Archived (a)
- Bindery (b)
- Closed Stack (csa)
- Damaged (dmg)
- Item missing (m)
- Missing Inventory (mi)
- In Cataloging (t)
- User fast-added item (ufa)

If you try to change an item status to a status that you cannot edit using the Item Group Editor–Status Only process, Horizon displays a message telling you to change the status through a Circulation transaction.

This section explains these topics:

- [Creating a Formal Item Group on page 160](#)
- [Editing Status Information Using a Formal Item Group on page 163](#)
- [Editing Status Information Using an Informal Item Group on page 165](#)

Creating a Formal Item Group

Before you use Item Group Editor–Status Only to edit information about the items in a group, you may want to create a formal item group using one of these methods:

- Search for items in Item Group Editor–Status Only and create a new group from your search results.
- Use an existing group.
- Select items from an existing group to create a new group.

For more information, see [Creating an Item Group on page 187](#).

This section explains these topics:

- [Creating a Formal Item Group on page 160](#)
- [Creating a Formal Item Group Using an Existing Item Group on page 162](#)

Creating a Formal Item Group

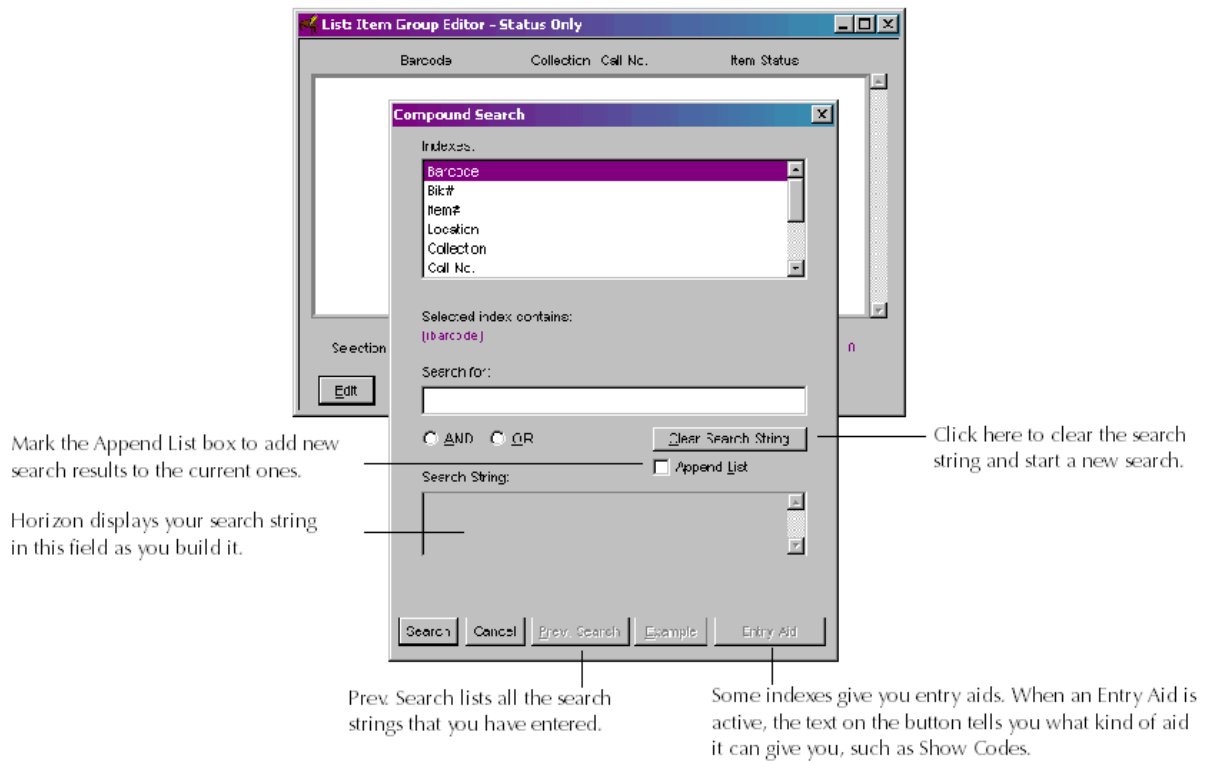
Item Group Editor–Status Only lets you search for items to create a new group. From your search results, you can choose any or all of the listed items. Your group can include any of the item records that exist in your library’s database.

To create a formal item group

- 1 Activate the **Item Group Editor–Status Only** process.

The default location of this process is the **Administration\Group Editor Menu** folder on the navigation bar.

Horizon opens the List Item Group Editor–Status Only window and a Compound Search window:



Note: If you are already in Item Group Editor–Status Only, you can choose one of the three search options from the File menu. However, if the List Item Group Editor–Status Only window already contains data, Horizon replaces the data when you do a new search. Unless you want to add criteria to a previous search by marking the Append List box, make sure that you finish working with any existing data in the List Item Group Editor–Status Only window before you start a new search.

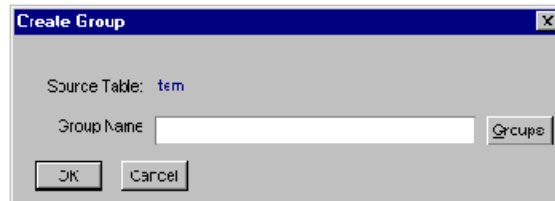
- 2 Highlight the search index in which you want to search.
- 3 Enter the term or code for which you want to search in the **Search for** field.
- 4 If you want to add another search parameter, do one of these options:
 - Mark the **AND** button (to limit your search).
 - Mark the **OR** button (to expand your search).
- 5 Continue adding search parameters until you enter all the search parameters that you want.
- 6 Click **Search**.

Horizon opens the List Item Group Editor–Status Only window and displays the items in your collection that match your search criteria.

Note: You can choose File and one of the search options to perform new searches or to add to current searches. (For instructions, see [Creating a New Item Group on page 188.](#))

- 7 Highlight the items that you want to include in your new item group. (To highlight the entire list, choose **Edit, Select All.**)
- 8 Choose **Group, Create Group.**

Horizon opens the Create Group dialog box:



If you have previously retrieved or created a group during this session, Horizon displays the name of that group in the Group Name field.

- 9 Enter a new name for the group in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.

- 10 Click **OK.**

Horizon returns to the List Item Group Editor–Status Only window. You can now choose or edit the items in the group.

Creating a Formal Item Group Using an Existing Item Group

Item Group Editor–Status Only saves the groups that you create. You can sort and choose from the items in these groups to create a new group.



A group created by someone else may have been created for a specific reason. Do not make any changes to a group or the items in it without checking with the person who created it. (For more information, see your system administrator.)

To create a formal item group using an existing item group

- 1 If Item Group Editor–Status Only is not open, do these steps:

- a Activate the **Item Group Editor–Status Only** process.

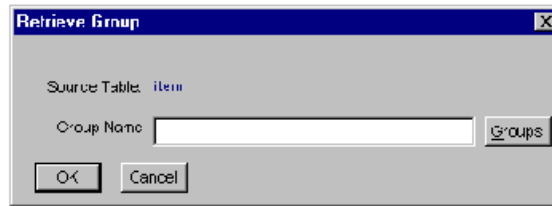
The default location of this process is the **Administration\Group Editor Menu** folder on the navigation bar.

- b Click **Cancel** twice.

Horizon displays an empty List Item Group Editor–Status Only window.

- 2 Choose **Group, Retrieve Group.**

Horizon opens the Retrieve Group dialog box:

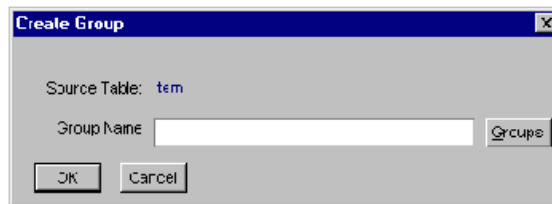


- 3 Enter the name of the saved group that you want to use (or click **Groups** to choose from a list of existing groups) and click **OK**.

Horizon displays the group items in the List Item Group Editor–Status Only window.

- 4 If you want to leave the original group unchanged, do these steps:
 - a Choose items from the group to create a new group. (To highlight the entire list, choose **Edit, Select All**.)
 - b Choose **Group, Create Group** to save the items you chose as a new group.

Horizon opens the Create Group dialog box:



If you have previously opened a group during this session, Horizon displays the name of that group in the Group Name field.

- c Enter a new name in the **Group Name** field.
You can add a date as part of the name to help you keep your groups organized.
- d Click **OK**.

Horizon saves the new group under the new name.

- 5 You can now choose or edit the items in the group.

Editing Status Information Using a Formal Item Group

You can create a formal item group (saving and naming it) when you want to change the status for a group of items and want Horizon to store the group as a named group in the database. This is particularly useful if you do not keep a hard copy record of the changes you make. (For example, you may want to retrieve a particular group to see exactly which items were in it and how the status was changed.)

You can also create a formal item group if you want to use the group again to make other changes. For example, you may want to change the item status of several items to "Damaged." Because you know that after further assessment, some of the items may be sent to the bindery, others may be sent to another location, and all will need

an internal note in the item record, you create a formal group. Using the formal group you created, you can change the item status to “Damaged” initially. You can retrieve the group later in Item Group Editor–Status Only and use it to change the item status to “Bindery” for the items you choose. The group is also available in the main Item Group Editor where you can change the location of the item and make any internal notes that you want.



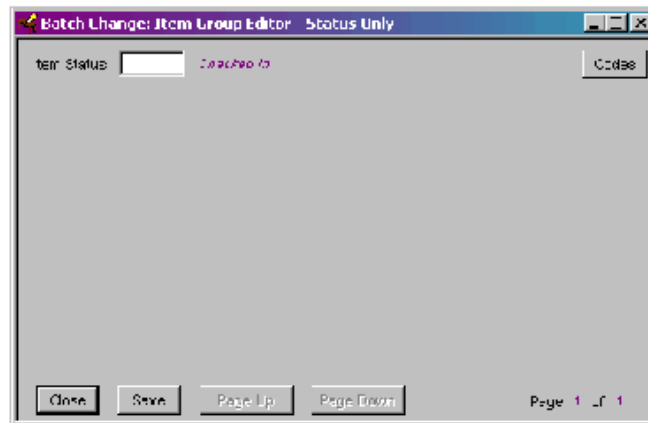
You can create, retrieve, and delete groups in Item Group Editor–Status Only just as you can in the main Item Group Editor, but you cannot archive or restore. Instead, you must retrieve or create a group each time you want to batch change the item status. This prevents you from inadvertently bypassing circulation processes that trigger other necessary circulation operations. It also helps you keep track of each item’s current status instead of just replacing it with a status that may no longer be valid.

To edit status information using a formal item group

- 1 Do one of these options to display an item group in the List Item Group Editor–Status Only window:
 - If you have not already created a group, create one. (For instructions, see [Creating a Formal Item Group on page 160.](#))
 - If you have previously created an item group, or want to use an existing group, do these steps:
 - Choose **Group, Retrieve Group**.
 - Horizon displays the Retrieve Group dialog box.
 - Click **Groups** to choose from a list of existing groups.
 - Choose the group that you want to display.
- 2 Highlight the items whose information you want to change. (To highlight all items in the group, choose **Edit, Select All**.)
- 3 Click **Edit**.

If you have no items highlighted, Horizon displays the edit window for the item that the select arrow was pointing to when you clicked Edit.
- 4 Click **OK** to confirm that you want to make a batch change to all the selected records.

Horizon displays the Batch Change Item Group Editor–Status Only window:



The window title bar may read "Edit Item Group Editor–Status Only" if you are changing only one record.

- 5 Enter the new item status for all selected items in the group.
- 6 Save your changes.

Editing Status Information Using an Informal Item Group

If you are sure that you do not need Horizon to store a record of the group as a group, you can quickly create an informal item group. Horizon changes the item status of each record in the group, but it keeps no record of which items were changed as a group. You can still make a hard copy record of the changes.

To edit status information using an informal item group

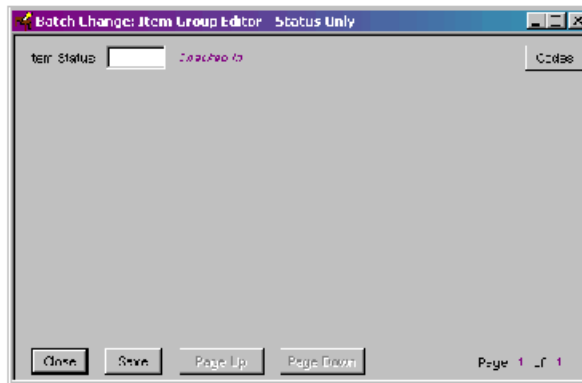
- 1 Activate the **Item Group Editor–Status Only** process.

The default location of this process is the **Administration\Group Editor Menu** folder on the navigation bar.

Horizon opens the List Item Group Editor–Status Only window and a Compound Search window.

- 2 Search for the items that meet your search criteria.
- 3 Highlight the items that you want to include in your new group and click **Edit**.
- 4 Click **OK** to confirm that you want to make a batch change to the selected records.

Horizon opens the Batch Change Item Group Editor–Status Only window:



- 5 Enter the new item status for all items in the group (or click **Codes** to choose the new status from a list.)
- 6 Save your changes.

Printing a Borrower Release Document

A borrower may request a formal document that he or she may take to another library location to certify that he or she has no obligations (for example, fines or checked out items) to your library location.



The Borrower Release Document feature is feature-activated. If you are interested in having this feature installed on your Horizon system, contact SirsiDynix Customer Support.



The **Allow Printing of Slips and Receipts** option in the Workstation Receipt Options must be enabled to print a borrower release document.

To print a borrower release document

- 1 Open the **CKO** window and load the borrower.
- 2 From the **File** menu, choose **Print Borrower Release**.

Horizon displays a confirmation dialog containing the borrower's name and borrower number.

- 3 Click **OK**.

If the borrower has no blocks, the borrower release document is sent to the printer.

If the borrower has blocks, Horizon displays a message noting that the borrower has blocks or checked out items. The borrower must resolve any blocks and check in any checked out items before Horizon will print the borrower release document.

Below is an example of a borrower release document:

Borrower release

Main Library
123 Main Street
City, ST 10000-0000

The head librarian certifies that

First Last
Student number: 123

is clear of any obligation toward the Library.

City, 10/9/15 04:19PM

Chapter 7: Reports

This chapter discusses the types of circulation reports that you can access or create and their uses.

This chapter contains these topics:

- [About Reports](#) on page 169
- [Using the Horizon Circulation Reports Process](#) on page 169
- [Using Other Horizon Circulation Reporting Options](#) on page 173
- [Using Third-Party Reporting Tools](#) on page 182

About Reports

Reports are generated as tools to help you in your library duties. You can use them to:

- Manage borrower requests and holds.
- Evaluate your collection by providing you with circulation statistics.
- Track cash transactions performed in Circulation.

You can access reports and gather circulation data in several ways: through the Horizon Circulation Reports process, searches using the Horizon Table Editor, or by using third-party reporting tools. (If yours is a school library, you can also obtain Horizon Reports Manager, which provides a reports package that contains report templates with pre-defined parameters.)

If you want, you can save the data to a file for later use or analysis. (For more information, see “Saving Data to a File” in the “Basic Tasks” chapter of the *Horizon Basics Guide*.)

Using the Horizon Circulation Reports Process

The Horizon Circulation Reports process provides two types of circulation information—one dealing with notices and the other with requests and holds. Using the Notices menu option, you can access the Notice Review list (which displays a list of pending notices to review for further action) or use Notice Output to print a batch of notices. (For instructions, see [Using the Notices for Review List](#) on page 107 or [Printing or E-mailing a Batch of Notices, Invoices, or Reminders](#) on page 109.)

Using the Requests menu option, you can access and print standardized reports such as the Request Pull List (which lists items to be gathered to fill borrower requests) or the Hold Shelf Report (which lists all requested items that have been checked in but have not yet been picked up by the requester).

This section deals with reports available through the Requests menu option and explains these topics:

- [Accessing, Saving, and Printing a Report](#) on page 170
- [Accessing the Requests Report](#) on page 171
- [Accessing the Request Pull List](#) on page 171
- [Accessing the Hold Shelf Report](#) on page 172
- [Accessing the Expired/Canceled Holds Report](#) on page 173

Accessing, Saving, and Printing a Report

The Horizon Circulation Reports process provides several standard reports that you can view, save, and print. Here is a list of the available reports:

- Requests
- Request Pull List
- Hold Shelf
- Expired/Canceled Holds



You can specify which fields of information are displayed in the list window as well as sort the entries by any of the columns displayed. (For more information, see “Changing the Columns in a List Window” or “Sorting a List Window” in the “Overview of Horizon Process Windows” section of the “Horizon User Interface” chapter of the *Horizon Basics Guide*.)

To access, save, and print a report

- 1 Start the **Circulation Reports** process.

The default location of this process is the **Circulation** folder on the navigation bar.

- 2 Choose the report to view from the **Requests** menu.

Horizon briefly displays a Loading Data window and then displays the compiled report in a list window. Use your cursor or the scroll bar to view all items in the queue.

- 3 Do one or both of these options:

- To print the list, choose **File, Print**.
- To save the data to a file, choose **File, Save to File**.

For further instructions, see “Saving Data to a File” in the “Basic Tasks” chapter of the *Horizon Basics Guide*.

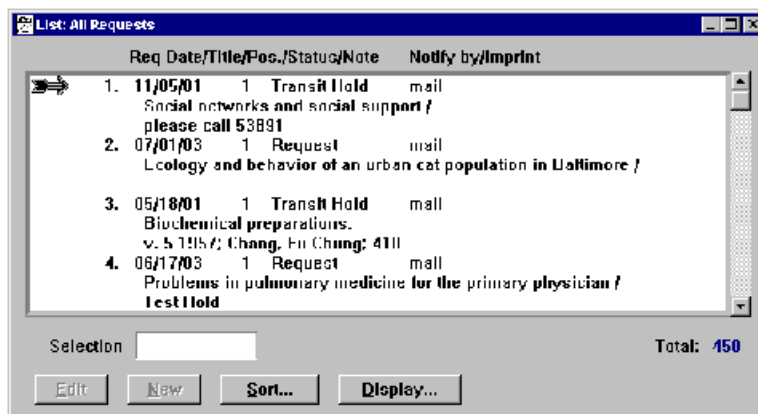
Accessing the Requests Report

This report is a list of all unfilled hold requests. When a borrower at your location or another branch requests an item at your location, Circulation sends the request to this report.

To access the Requests report

- Choose **Requests, Requests** in the Circulation Reports process.

Here is an example of the All Requests list window:



Accessing the Request Pull List

The Request Pull List is a list of items to be gathered to fill borrower requests. You can print out the report and use it as a pull list to find the requested items to hold or send to the proper location. (For more information, see [Accessing, Saving, and Printing a Report](#) on page 170 and [Filling a Hold Request Made at Another Location](#) on page 50.)

You can also use the Request Pull List to delete single or multiple hold requests. (For instructions, see [Deleting a Hold Request Using the Pull List](#) on page 55.)

If items exist on the list which you do not want to send to another location, you can keep the item and refuse the request. If another location does not fill the request, however, it may appear on your list again.

If you do not respond to the request within twenty-four hours and there is another location with the title checked in, the request will automatically be transferred to the other branch's Request Pull List. If the other branch does not fill the request, then the request may appear on your list again.

Occasionally, requested items with statuses that have been changed from "checked out" to "checked in" through a Day End process are placed on this report, even if the request was placed at your branch. These requests can be filled in the same manner as you fill other requests on this report.

The Pull List is affected by the Transit Location Group parameter. An item will not be added to the pull list if the hold pickup location is not in the transit location group of the current location and there is another item within the pickup location's transit location group that can satisfy the hold. See "Setting Up Transit Location Groups" in the *Circulation Setup Guide* for more information.

To access the Request Pull List report

- Choose **Requests, Request Pull List** in the Circulation Reports process.

Here is an example of the Request Pull List list window:

Title/Call No.	Barcode	Name	Pickup
1. Dossier socio-économique de la circonscription électorale 330.97146504021 DOSS	39999005005242	Heritage, Auer	Fulano de Tal
2. Insurance Competition Improvement Act. S. 2474 : hearing J46.73006 J47.30606 UNIT	39999009059526	Landry, Tom	Fulano de Tal
3. Alternative Alcott / ALCO	39999000595617	Kerr, Joe	Fulano de Tal
4. Filozofija istine / BD171 .B655 1996	39999006410554	Lands, My	Fulano de Tal
5. Crisi e rinascita della spiritualità : dal Sette all'Ottocento / DY4504 .V45 1902	39999004051114	Ligan, Ili	Fulano de Tal

Annotations:

- Lists all requests that you can fill at your location. (points to the table)
- Binds items to requests. Lets Horizon know you are satisfied with the list and will pull the items. (points to the List Pulled button)
- Lets you cancel the report without binding any of the items to the requests. (points to the Keep List button)
- Lets you keep selected items in your library instead of sending to the requester. Removes those items from your pull list. (points to the Keep Item button)
- Lets you delete a borrower's request from the system. (points to the Delete Request(s) button)
- Lets you sort the list according to selected criteria. (points to the Sort... button)
- Lets you change the type of information displayed for requested items. (points to the Display... button)



If the Request Pull List window displays the message "Using Location Priority" in the header, your system administrator has specified that Horizon sorts requests on the Request Pull List according to location priority. In other words, Horizon matches borrower requests to the owned items of the borrower's chosen pickup location before sending an item to another location. This minimizes the number of transit holds at your library.

If the Request Pull List window uses the Location Priority setting, you must click the List Pulled button at the bottom of the window before you check in items to fill requests. When you click this button, Horizon binds each request in the Request Pull List to the item's owning location.

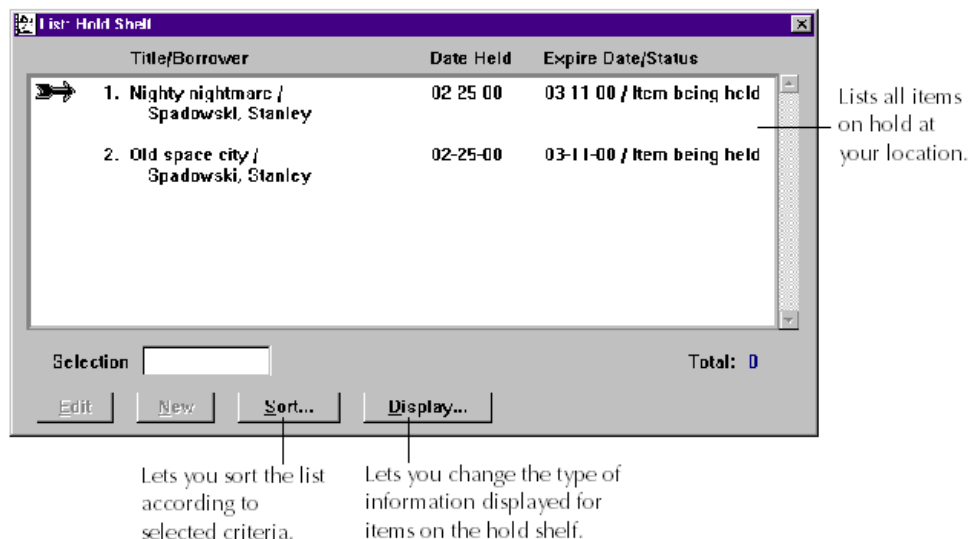
Accessing the Hold Shelf Report

This report lists all requested items that have been checked in but have not yet been picked up by the requester.

To access the Hold Shelf report

- Choose **Requests, Hold Shelf** in the Circulation Reports process.

Here is a sample Hold Shelf list window:



Note: When a borrower cancels a hold for an item already on the hold shelf, the status indicates that the item should be removed from the hold shelf.

Accessing the Expired/Canceled Holds Report

The Expired/Canceled Holds report shows you a list of holds that have expired or been canceled since the last Day End process was run. It is similar to the Hold Shelf Report in that it uses the same selection criteria. However, this report shows only expired and canceled holds. (The Hold Shelf report continues to show expired and canceled holds as well as all current valid holds. For more information on the Hold Shelf Report, see [Accessing the Hold Shelf Report on page 172.](#))

To access the Expired/Canceled Holds report

- Choose **Requests, Expired/Canceled** in the Circulation Reports process.

Here is an example of the Expired or Canceled Holds list window:

Using Other Horizon Circulation Reporting Options

In addition to the reports that Circulation provides in Circulation Reports, the Horizon Table Editor offers information relating to circulation. You can search on a single index, or use compound or SQL “where” clause searches to gather the information you need. (For instructions, see “Using the List Search Window” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide*.) You can also access information during Checkin about the in-house use of non-circulating items.

This section explains these topics:

- [Opening a View in the Table Editor Process](#) on page 174
- [Accessing In-House Use Information for an Item](#) on page 174
- [Generating an In-House Use Statistics Report](#) on page 175
- [Accessing, Saving, and Printing a Report](#) on page 170
- [Accessing Cash Transaction Statistics](#) on page 180

Opening a View in the Table Editor Process

Some of the tasks you do to access information or generate a report require you to open a Table Editor view.

To open a view in the Table Editor process

- 1 Start the **Table Editor** process.

The default location of this process is the **Administration** folder on the navigation bar.

Horizon displays the Code Lookup Horizon View window.

- 2 In the **Mq View** field, start entering the table name until Horizon places the selector arrow next to the view you want.

- 3 Click **OK**.

Horizon opens the Table Editor view.

For more information on using the Table Editor, including instructions for using Sort, Display, or Codes buttons, see the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide*.

Accessing In-House Use Information for an Item

You can keep track of item use statistics for non-circulating items (such as reference materials) or other items that are used within your library but not checked out.

When you check in an item using the in-house mode, Circulation displays the item’s total number of in-house uses and the date of the item’s last in-house use.

Additionally, you can print this information by creating an in-house use report. (For instructions, see [Generating an In-House Use Statistics Report](#) on page 175.)



If you use a circulation tool such as Horizon Offline Circulation or 3M Automated Circulation System to check in items, the in-house mode is not available. Horizon cannot compute in-house use statistics if you do not use Horizon Circulation.

To access in-house use information for an item

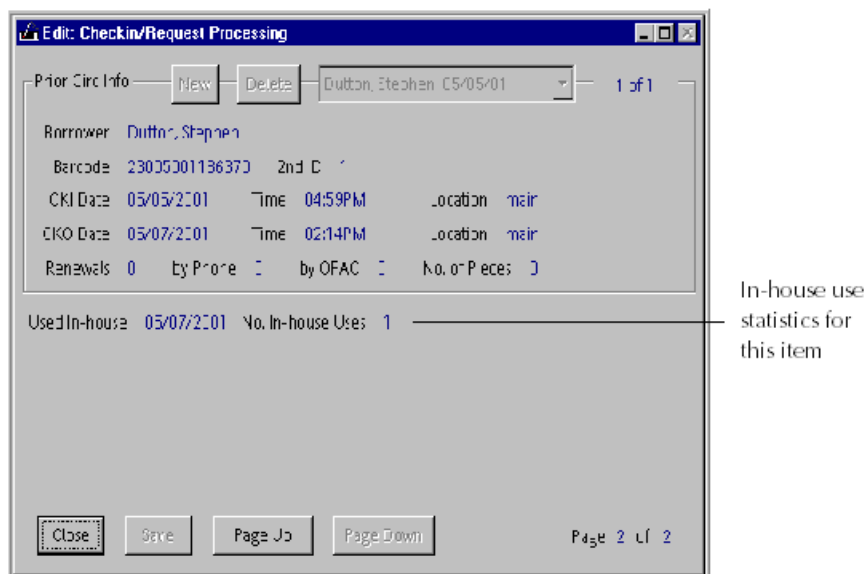
- 1 Check in an item using in-house mode. (For instructions, see [Setting Up a Checkin Mode](#) on page 25 and [Checking In an Item Normally](#) on page 27.)

Horizon records that the item has been used and displays the item’s status as if you had checked in an item that had been checked out.

- 2 Choose the item whose in-house statistics you want to view.

Horizon displays the Edit Checkin/Request Processing window.

- 3 Click **Page Down** or resize the window until you find the in-house use statistics:



- 4 Click **Close** to exit the Edit Checkin window.
- 5 Repeat steps 1 through 4 for each item whose in-house use statistics you want to view.

Important: Items continue to check in in the In-House mode until you change to another mode or until you close Circulation.

Generating an In-House Use Statistics Report

To let you create an in-house use report, Horizon includes these indexes:

- **Used In-house.** This index is built on the dates when items were last used in-house.
- **In-house Uses.** This index is built on the total number of in-house uses that items have accumulated.



For in-house use statistics to be included in these indexes, circulation staff must check in items using in-house use mode. (For more information, see [Setting Up a Checkin Mode](#) on page 25.)

If you use a circulation tool such as Offline Circulation or 3M Automated Circulation System to check in items, Horizon's in-house mode is not available. Horizon cannot track in-house use statistics for items checked in using these tools.

To generate an in-house use statistics report

- 1 Open the **item_report** view in the Table Editor. (For instructions, see [Opening a View in the Table Editor Process](#) on page 174.)

Horizon displays a search window.

2 Do one of these options to view the in-house use information you want:

If you want to do this	Do this
Find items using the date each item was last used in-house.	<p>1. Search on the Used In-house index.</p> <p>You can use the Date Range button to narrow the dates of your search by searching prior to or since a certain date, or by searching between a range of dates. (For example, you can search for items that were last used in-house since May 10, 2001.) You must enter your date in a numerical month/day/year format, such as “5/10/01.”</p>
Find items using the number of times each item has been used in-house.	<p>1. Search on the In-house Use index.</p> <p>You can use mathematical terms as search parameters to narrow or broaden your search. (For example, you can enter “>=3” to search for all items that have been used in-house three or more times.)</p>
Find items using multiple indexes. (For example, you can narrow your search for in-house use to a specific collection or location.)	<p>1. Click Cancel to close the Search window.</p> <p>Horizon asks if you want to load all the rows in this large view.</p> <p>Note: Loading all the rows for this search could take a long time, depending on the size of your database.</p> <p>2. Click OK.</p> <p>3. Choose File, Compound Search.</p> <p>Horizon displays the Compound Search window.</p> <p>4. Do a compound search on any indexes you need to use to get the statistics you want. (For example, you can search on the Used In-House index and the Main Location index to find the dates when items in your main collection were last used in-house.)</p>

For instructions on searching, see “Using the List Search Window” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide*.

Horizon displays your search results by item in a List window.

3 To display the Used In-house and In-house Uses columns, do these steps:

- a Click **Display**.

The Table Editor opens the Display window.

- b In the **Choose columns to display** list, highlight the **Used In-house** and **In-house Uses** columns.

- c If you want to, change the order that the columns display or the column width. (For more information, see “List Windows” in the “Horizon User Interface” chapter of the *Horizon Basics Guide*.)
- d Click **OK**.

The Used In-house column shows the date each item was last used in-house. The In-house Uses column shows the number of times the item has been used in-house:

Horizon displays the date the item was last used in-house, and the total number of in-house uses for this item.

Collection/Title/Call No./Item Status/Copy/Note/Barcode/Used In-house/In-house Uses
1. main-stx: NE510 P3 1503 mc:2 Gift drawing and gift song: a study of two forms of Shaker inspiration / Checked In- 05/29/01 2
2. main-stx: 881E mc:3 Margot la rouge lyric opera in one act / Checked In-
3. main-stx: NE020 E M6 mc:4 The first show: painting and sculpture from eight collections, 1940-1930 / Checked In- 05/29/01 3
05/29/01 2

Selection Total: 5

Edit New Sort... Display...

- 4 Do one or both of these options:
 - To print the list, choose **File, Print**.
 - To save the data to a file, choose **File, Export Record(s)**.

For further instructions, see “Saving Data to a File” in the “Basic Tasks” chapter of the *Horizon Basics Guide*.

Accessing Item Circulation Statistics

The item_report view in the Table Editor helps you evaluate your collection in many ways, including circulation terms. You can search on any of the indexes, display any of the columns, and sort the items, just as you can in any list window. (For instructions, see “List Windows” in the “Horizon User Interface” chapter of the *Horizon Basics Guide*.) Horizon can display such statistics as the item status, number of checkouts, last checkout date, and due date in the item_report view.

To access item circulation statistics

- 1 Open the **item_report** view in the Table Editor.

Horizon displays a search window.

- 2 Search for the information you want.
- 3 Do one or both of these options:
 - To print the list, choose **File>Print**.
 - To save the data to a file, choose **File>Export Record(s)**.

For further instructions, see “Saving Data to a File” in the “Basic Tasks” chapter of the *Horizon Basics Guide*.

Viewing Circulation Statistics by Bib Record

You can view usage statistics for a library item by its bib record. Usage statistics track the number of first-time checkouts, renewals, phone renewals, and in-house uses for time periods that the system administrator sets up. These time periods can be the current month, any previous months, or the total count for a year. (For instructions on setting up time periods, see the “Setting Up Time Periods for Gathering Bib Usage Statistics” section in the *Circulation Setup Guide*.)

Horizon cannot collect usage statistics for any date previous to the date when the periods begin. (For example, if you set up a time period to start at a date in the past, Horizon can only track statistics starting at the current date.)

Horizon maintains usage statistics for the location where each item is circulated, rather than the location where each item is owned. (For example, if a borrower from a library branch requests a book from the main library and then checks the book out through the branch, the statistics for that book would indicate the usage at the library branch.)

Horizon keeps statistics for the current year and the previous five years at the bib level, not at the item level. If an item record is deleted, its usage statistics are still saved with the bib record.

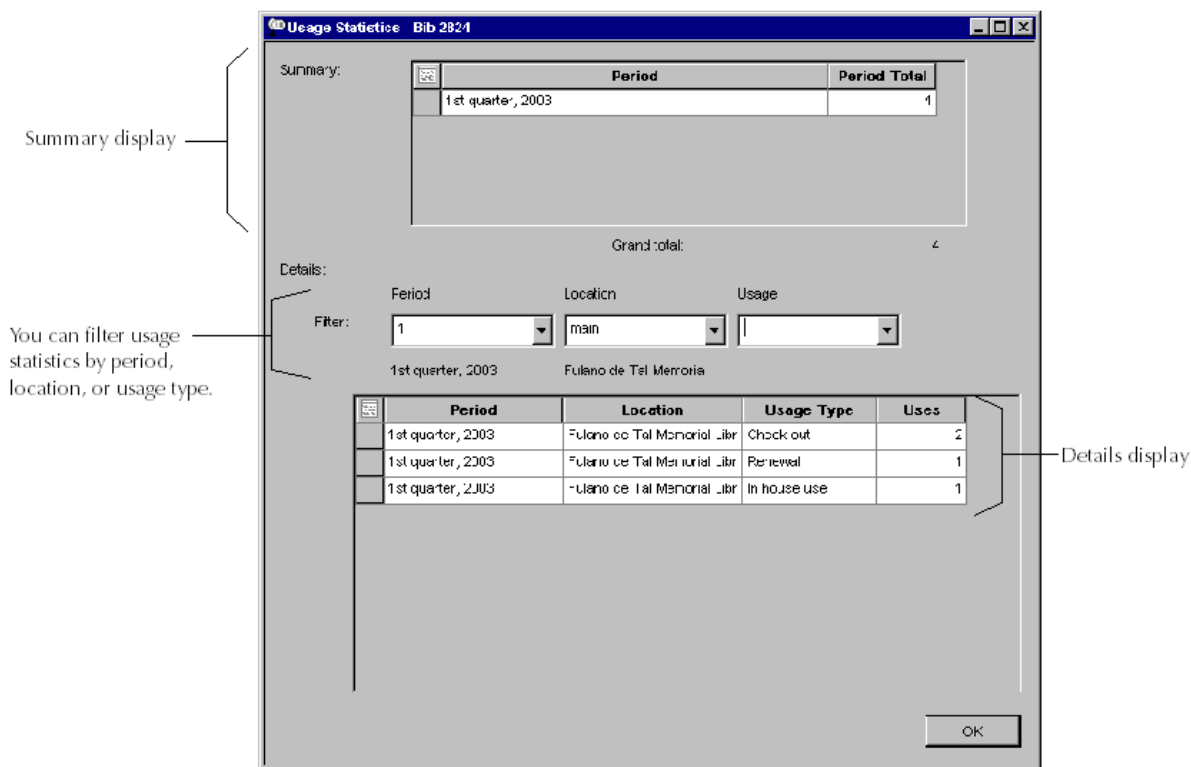
To view circulation statistics by bib record

- 1 Find the bib record for which you want to view statistics.
- 2 Press **F10** or choose **Edit, Send to**.
- 3 Do one of these options:
 - Choose **Edit, Send to**.
 - Press **F10**.

Horizon displays the Send to dialog box.

- 4 Choose **View Usage Statistics**.
- 5 Click **OK**.

Horizon displays the usage statistics for the bib record:



The Summary display shows the total statistics for all usage types.

The Details display shows the statistics for individual usage types. Statistics for usage types are calculated independent of each other. (For example, the number of phone renewals are not included in the number of renewals; the “Check Out” statistics do not include the “Renewal” statistics.)

Horizon keeps usage statistics for the current year and the previous five years, even if the bib or item record is deleted.

Note: Horizon cannot collect usage statistics for any date previous to the date when the period begins.

- 6 Do one or more of these options:
 - To sort by period, choose the period you want from the **Period** drop-down list.
 - To sort by location, choose the location you want from the **Location** drop-down list.
 - To sort by usage type, choose the usage type from the **Usage** drop-down list.

Horizon sorts the statistics by the criteria you chose and displays the results in the Details display.

- 7 Click **OK**.

Accessing Cash Transaction Statistics

Horizon tracks cash transactions performed in Circulation, such as fine payments and refunds, and stores them in a view. You can extract information from the view using a third-party report generator and then print reports.

Horizon tracks this information in the fee payment transaction log:

- **Who performed the transaction.** Determined by the user ID and password of the person who logged in to Circulation. (For information about setting up user IDs, see “Securing Horizon” in the “Security and Preferences” chapter of the *System Administration Guide*.)
- **What kind of transaction was performed (fine payment, refund, waiver, fee amount change).** Determined by the fee type block chosen when the transaction occurred. (For information about fee block types, see “Setting Up or Editing a Block Type” in the “Setting Up Blocks” section of the *Circulation Setup Guide*.)
- **When the transaction occurred.** Determined by the computer’s operating system date and time.
- **Which cash drawer, workstation, department, and location that the transaction took place at.** Determined by the workstation parameters and location ID specified at the workstation. (For information about identifying where the transaction took place, see [Setting Workstation Parameters to Track Payments on page 91](#).)
- **When the block was incurred, in what amount, and against which borrower.** Determined by the computer’s operating system date and user entry, and the borrower record.
- **Whatever information you want to include about any payment made, including a description of the transaction, the form of payment, check number (if applicable), and amount.** Determined by user entry.

You can view the information in the log, but Horizon recommends that you use a third-party report generator to create more detailed reports. (For instructions, see your third-party reporting tool’s user’s guide.)

To access cash transaction statistics

- Open the **fee_payment_log** (Fee Log for Cash Mgmt.) view in the Table Editor. (For instructions, see [Opening a View in the Table Editor Process on page 174](#).)

Here is an example of the Payment History list window:

	Date/Descr	Dept.	Payment	Fee	Amount
111.	01/00/96 Fees	horizon	payment	fee	3.00
112.	03/27/96	1	payment	fine	12.50
113.	02/28/96 test	train	payment	damage	10.00
114.	02/28/96 This is a test	train	payment	fee	10.00
115.	02/28/96 Ella Fitzgerald sings The George	train	payment	fine	6.75
116.	04/01/96 Palm Sunday an autobiographical	1	payment	1	10.00

Selection: Total: 672

Buttons: Edit, New, Sort..., Display...

You can display these fields as columns in the list window:

- Date that the fee transaction occurred.
- Department where the transaction occurred.
- Payment type made, such as credit adjustment, refund, payment, and additional types that you have set up.
- Fee type block that the transaction is for (fine, fee, lost, and so forth).
- Total amount of block.
- Description of the transaction.
- Borrower number for which the transaction was made (taken from the borrower record).
- Payment number that Horizon assigns to the transaction.
- Location at which the transaction occurred.
- Time that the transaction was made.
- Cash Drawer ID from which the transaction was made.
- Workstation ID (workstation at which the transaction was made).
- User who conducted the transaction (determined by logon ID).
- Check number, if paid by check.
- Amount paid, refunded, waived, adjusted, and so forth.
- Reference number Horizon assigns to the block.
- Order number Horizon assigns to the block.
- Date the fee type block was incurred.

Using Third-Party Reporting Tools

In addition to the reports that Circulation provides in the Circulation Reports process and the circulation statistics that you can access through the Table Editor, you can run custom reports using a third-party reporting tool such as ReportSmith or EasyAsk. If you are unsure about which application you have, contact your system administrator.

Your system administrator can install a menu option for each report on the navigation bar. (For more information, see “Adding a Process to a Folder” in the “Customizing the Navigation Bar” chapter of the *Launcher Configuration Guide*.)

This section explains these topics:

- [Generating a Checkouts by Title Report on page 182](#)
- [Generating a Cash Transactions Report on page 183](#)

Generating a Checkouts by Title Report

To see how much use a title gets, you can review the Checkouts by Title report. This helps you maximize your library’s resources by monitoring wear and tear on popular titles and identifying unused items that are taking up shelf space. Using this report and working with your Acquisitions staff, you can quickly determine whether to replace damaged items or make sure that your library orders the appropriate number of items for a particular location.

Here is an example of the Checkouts by Title Report using EasyAsk to display it:

The query used to generate this report is listed across the top.

Each branch with a copy of this title is shown in Item Location.

ewhorizon1.dcl						
	A	B	C	D	E	F
1	report of all item barcode, usage, location, title for a specified bib#, group by location					
2				R/ 7/00 14 43		
3				Bib#: 23		
4	Item Location	Item Barcode	Usage	Title Name		
5	MAIN	39154004088209	38	Busy bodies Joar Hess		
6		39154004088156	24	Busy bodies Joar Hess		
7	MAIN Sum		62			
8	STP	39154004088159	39	Busy bodies Joar Hess		
9	STP Sum		39			
10	Overall Sum		101			
11						

The bib record that corresponds to the title is under the date and time the report was generated.

Overall Sum shows how many times every item with this title has been checked out or used.

The title of the item and the author are under Title Name.

To generate a Checkouts by Title report

- 1 Open your reporting tool. (For example, open the EasyAsk Query Builder.)
- 2 Enter this query to run the Number of Checkouts per Title Report from scratch:

```
report of all item barcode, usage, location, title for a specified bib#, group by location
```

Important: Enter this text exactly as shown. If text wraps, insert one space at that point. Do not insert carriage returns or extra spaces.

- 3 Enter the bib record number of the title.
A report will be displayed for the title you are interested in.
- 4 If you want to, print this report or save it to a file. (For instructions, see your third-party reporting tool's user's guide.)
- 5 Save this query in your dictionary. (For instructions, see the *Easy Ask Administrator's Installation and Deployment Guide*.)

Generating a Cash Transactions Report

Horizon tracks cash transactions performed in Circulation, such as fine payments and refunds, and stores them in a transaction log. (For instructions on viewing the log, see [Accessing Cash Transaction Statistics on page 180](#).) Using a third-party report generator, you can extract information from the view to generate and print a detailed cash transactions report. (For instructions, see your third-party reporting tool's user's guide.)

Appendix A: Using the Item Group Editor

This appendix explains how to use the Item Group Editor to make temporary or permanent changes to a group of items at one time.

This appendix contains these topics:

- [Using Item Group Editor on page 185](#)
- [Creating an Item Group on page 187](#)
- [Archiving Information about an Item Group on page 193](#)
- [Editing Information about an Item Group on page 194](#)
- [Restoring Information about an Item Group on page 197](#)
- [Clearing Archived Information about an Item Group on page 199](#)

Using Item Group Editor

On occasion, you may need to change the information in a specific field for multiple item records. (For example, before moving a group of items to a new location, you need to change the location field on every item record so borrowers can find the items.) You can change the information in one or more fields for multiple item records by using Item Group Editor.

Item Group Editor lets you archive, edit, and restore data that relates to a group of items. To use Item Group Editor, you first create a group of items (called an item group, or group) by searching for items that match your specific criteria. You archive information about those items to keep a copy of the information you originally cataloged. Then you can change the data in certain fields of the whole group at once. These changes can be temporary or permanent. If they are temporary, when the time to use those temporary changes has passed, you restore the archived, original information.

You can edit information in these fields for a group of items:

- Item Type
- Location
- Collection
- Call Type
- Call No.
- Source
- Price

- Item Note
- Item Status
- Internal Note



If you cannot edit Item Statuses, you may need to have this feature activated. (For more information, see your system administrator.)

Horizon lets you change only certain item statuses. This prevents you from inadvertently bypassing circulation processes that trigger other necessary circulation operations. If you try to change an item status to a status that you cannot edit using the Item Group Editor, Horizon displays a message telling you to change the status through a Circulation transaction.



Do not attempt any direct update of the item status using SQL. Unless you know exactly what you are doing, you stand a very good chance of corrupting your database. For example, changing an item's status from "o" to "i" will orphan data in the circ table, bypass any fines calculations if the item is overdue, leave rows in the recall table, leave unresolved blocks on the borrowers, and ignore any pending requests.

Other item status values can have similar problems.

Here is an example of how your library can use Item Group Editor. A professor wants to put certain items on reserve. These items may include documents, books, videos, or any other items from any of your library's locations. You can create a group made up of these items in Item Group Editor and archive the group's original cataloging information. You can use Item Group Editor to change all the call numbers so that they direct borrowers to the reserve stacks. Then you move the items to the reserve shelves. If the professor wants students to be able to check out some of the items in his list for only three hours and others for overnight, you can use Item Group Editor to change the ITYPEs to reflect the different checkout periods. When the professor no longer wants any of the items held on reserve, you can restore the archived list that contains the general stack call numbers and regular ITYPE information and reshelv the items in the general stacks. Then you can clear the archive and delete the group so that it is not inadvertently used at a later time.

You can use Item Group Editor when you do tasks such as these:

- Loan a group of items to another agency.
- Transfer materials permanently to a new location.
- Make a group of items available for reserve only.
- Make a group of items available for media scheduling.
- Change fine rates for a group of items.
- Change the loan period for a group of popular items such as holiday books during peak times.
- Choose items for home service users.
- Change groups of call numbers.

- Add local notes to items.
- Correct default information.
- Change or identify a purchasing source.
- Change the collection code of a section of items so borrowers cannot check them out during inventory.
- Change the price on a group of journals.

The default location of the Item Group Editor is the Administration/Group Editor Menu folder on the navigation bar.

Creating an Item Group

Before you can use Item Group Editor to archive or edit information about the items in a group, you may need to create an item group. An item group can contain any items that exist in your library's database. To create an item group, you can do any of these things:

- Search for items in Item Group Editor and create a new group. When you search for items, Item Group Editor displays your search results in a list. You can use all the items on that list as your group, or you can choose items from that list to create a smaller group.
- Use an existing group or list as your group.
- Choose items from an existing group or list to create a group. You can sort and choose items from groups and lists until the group that you want to edit contains only those items that you want it to contain. When you open Item Group Editor, Horizon displays a compound search as its initial search screen. A compound search lets you be more specific about what items go into your group. You can also handpick items from your search results to create your group by highlighting each item that you want.

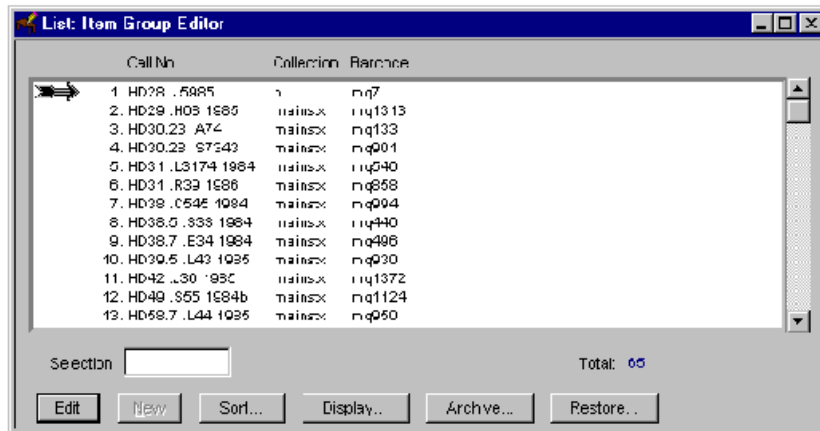
You can search for multiple items on these indexes:

- Barcode
- bib#
- item#
- Location
- Collection
- Call No.
- Source
- Price
- Item Status
- Notes
- IType

When you highlight certain indexes, the Entry Aid button on the Compound Search window changes to “Show Codes.” Clicking the Show Codes button lists the valid codes that you can choose to narrow your search.

You can use wild cards in your searches to get a range of items. (Wild cards include an asterisk [*] and the percent sign [%], which you can substitute for missing single characters.) (For example, if you search on the Call No. field with the search string “HD*”, Horizon returns a group of items with call numbers that start with HD.)

Horizon displays search results in the List Item Group Editor window:



You can start a new search or add more parameters to a current search at any time by choosing a different search option, such as Search or Where, from the File menu. (For more information, see “Using the List Search Window” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide*.) The Sort and Display functions let you arrange the items that your search finds. This can help you choose similar items for your group. (For instructions, see “List Windows” in the “Overview of Horizon Process Windows” section of the “Horizon User Interface” chapter of the *Horizon Basics Guide*.)



You cannot search in an existing group. Use the Sort and Display functions to organize the information in a group and then manually choose items to create a more specific group, or redo your search with additional parameters.

This section explains these topics:

- [Creating a New Item Group on page 188](#)
- [Using an Existing Item Group on page 192](#)

Creating a New Item Group

Item Group Editor lets you search for items to create a new group. Item Group Editor uses a compound search as its initial search screen, but you can also search using a simple search screen or a Where clause. (For instructions, see “Using the

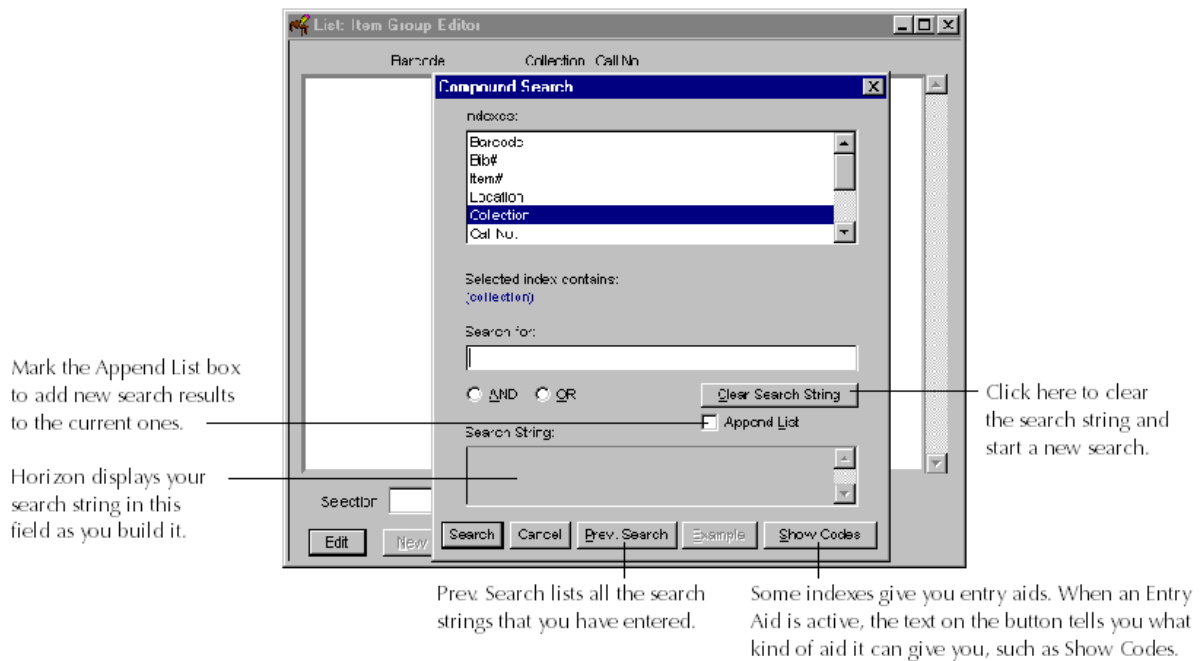
List Search Window” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide*.) You can also handpick items from your search results to assure that your group contains only those items that you want it to contain. Your group can contain any items that exist in your library’s database.

To create a new item group

1 Start the **Item Group Editor** process.

The default location of this process is the **Administration/Group Editor Menu** folder on the navigation bar.

Horizon opens the List Item Group Editor window and a Compound Search window:



Note: If you are already in Item Group Editor, you can choose one of the three search options from the File menu. However, if the List Item Group Editor window already contains data, Horizon replaces the data when you do a new search. Unless you want to add criteria to a previous search by marking the Append List box, make sure that you finish working with any existing data in the List Item Group Editor window before you start a new search.

2 Highlight the search index in which you want to search.

You can search for multiple items on these indexes:

- **Barcode.** Use wild cards to search for a range of items.
- **Bib#.** Use wild cards to search for a range of bib records.
- **Item#.** Use wild cards to search for a range of item numbers.
- **Location.** Click **Show Codes** for a list of valid location codes.
- **Collection.** Click **Show Codes** for a list of valid collection codes.

- **Call No.** Use wild cards to search for a range of call numbers.
 - **Source.** Enter the code for the item supplier.
 - **Price.** Use wild cards to search for a range of prices.
 - **Notes.** Enter words or phrases from the bib record note field.
 - **Itype.** Click **Show Codes** for a list of valid circulation types.
 - **Item Status.** Click **Show Codes** for a list of valid statuses.
- 3 Enter the term or code for which you want to search in the **Search for** field.
 - 4 If you want to add another search parameter, do one of these options:
 - Mark the **AND** button (to limit your search).
 - Mark the **OR** button (to expand your search).
 - 5 Continue adding search parameters until you enter all the search parameters that you want.
 - 6 Click **Search**.

Horizon opens the List Item Group Editor window and displays the items in your collection that match your search criteria.

Note: If Horizon does not find items in your collection matching your search criteria, a Search Message box opens telling you that nothing was found. Click **OK** to return to the Compound Search screen and enter new search criteria.

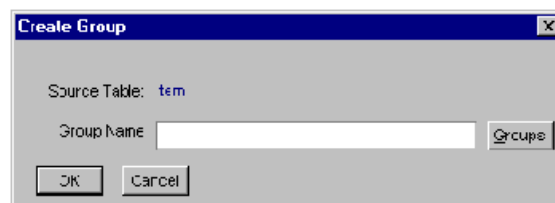
- 7 If you want to refine your search or start a new search, do one of these options:

To use an SQL statement search	To do a Boolean search	To do a basic search
<p>1. Choose File, Where clause.</p> <p>If you choose the Where clause when Horizon is displaying the results of your current search, the parameters for the first search display in the Where clause field.</p> <p>2. If you want to, do one of these options:</p> <ul style="list-style-type: none"> • To refine the search results, add to the parameters and click Search. • To use different parameters, delete the displayed parameters and start a new search. <p>For instructions, see “Using a Where Clause to Search for Rows” in the “Horizon Table Editor” section of the “Getting Started” chapter of the <i>System Administration Guide</i>.</p>	<p>1. Choose File, Compound Search.</p> <p>This lets you perform Boolean searches using the AND and OR operators.</p> <p>If you choose the Compound Search when Horizon is displaying the results of your current search, Horizon displays the parameters from the first search in the Search String window.</p> <p>2. If you want to, do one of these options:</p> <ul style="list-style-type: none"> • To add to the previous search parameters, mark the Append List box. Then add to the parameters and click Search. • To use different parameters, click Clear Search String and start a new search. <p>For more information, see “Doing a Compound Search” in the “Horizon Table Editor” section of the “Getting Started” chapter of the <i>System Administration Guide</i>.</p>	<p>1. Choose File, Search.</p> <p>2. Highlight the index that you want to use.</p> <p>3. Enter the search term that you want to use.</p> <p>4. Click OK.</p>

Note: When Item Group Editor is open, you can choose File and one of the search options at any time to perform new searches or to add to current searches. (For instructions, see “Using the List Search Window” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide*.)

- 8 Highlight the items in the List Item Group Editor window that you want to include in your new group. (To highlight the entire list, choose **Edit, Select All**.)
- 9 Choose **Group, Create Group**.

Horizon opens the Create Group dialog box:



If you have previously retrieved or created a group during this session, Horizon displays the name of that group in the Group Name field.

- 10 Enter a new name for the group in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.

11 Click OK.

Horizon returns to the List Item Group Editor window. You can now choose, archive, or edit the items in the group.

Using an Existing Item Group

Item Group Editor saves the groups that you create. You can also create groups of items in the Table Editor using the item_report table. Item Group Editor lets you access these groups and archive or edit their data. You can sort and choose from the items in these groups to create additional groups of items.



A group created by someone else may have been created for a specific reason. Do not make any changes to a group or the items in it without checking with the person who created it. (For more information, see your system administrator.)

To use an existing item group

1 Do one of these options:

- If Item Group Editor is not open, do these steps:

- Open the **Item Group Editor** process.

The default location of this process is the **Administration/Group Editor Menu** folder on the navigation bar.

Horizon opens the List Item Group Editor window and a Compound Search window.

- Click **Cancel** twice.

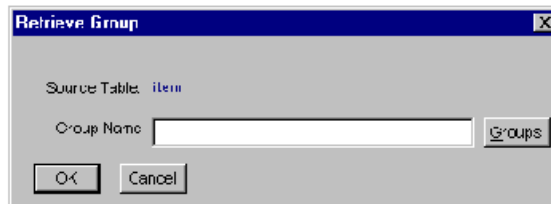
Horizon displays an empty List Item Group Editor window.

- Choose **Group, Retrieve Group**.

- If you are already in Item Group Editor, choose **Group, Retrieve Group**.

Note: When you retrieve an existing group, Horizon replaces any existing data in the List Item Group Editor window. Make sure that you finish working with any existing data in the List Item Group Editor window before retrieving a group.

Horizon opens the Retrieve Group dialog box:



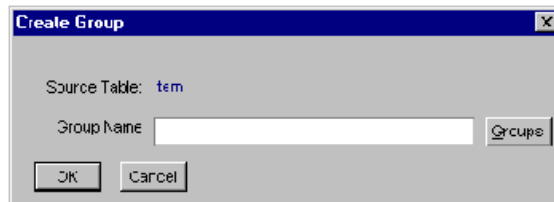
- 2** In the **Group Name** field, enter the name of the saved group that you want to use, or click **Groups** to choose from a list of existing groups.

- 3** Click **OK**.

Horizon displays the group items in the List Item Group Editor window.

- 4 If you want to leave the original group unchanged, do these steps:
 - a Choose items from the group to create a new group. (To highlight the entire list, choose **Edit, Select All.**)
 - b Choose **Group, Create Group** to save the items you chose as a new group.

Horizon opens the Create Group dialog box:



If you have previously opened a group during this session, Horizon displays the name of that group in the Group Name field.

- c Enter a new name in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.
- d Click **OK**.

Horizon saves a second copy of the group under the new name.

- 5 You can now choose, archive, or edit the items in the group.

Archiving Information about an Item Group

Once you have chosen items for your group, Item Group Editor lets you archive the information associated with the items before you make any changes. This keeps the original item information safe in a separate table. Then you can make changes to the information, and Horizon displays those changes in your library's database. To reverse the changes, you must restore the archived data. This brings the original information back into your database, replacing the changes you made. (For more information on restoring data, see [Restoring Information about an Item Group on page 197.](#))

When you archive data, Item Group Editor creates a group that contains only the items you highlighted in the List Item Group Editor window when you archived the information. It also creates a table of archived data that is associated with this group. If you use an existing group name when you archive data, Horizon replaces both the previously archived data and the previously created group. When you name your group during archiving, make sure you do not choose the name of an existing group unless you are sure that you want to replace it.

Your system administrator controls who has the rights to use this feature.

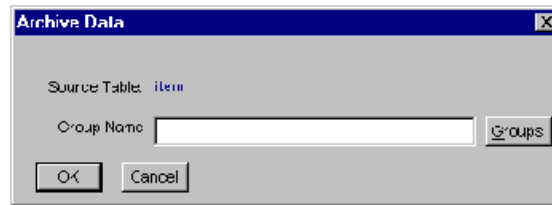


You archive information about a group by using a unique name. Make sure that you remember the name and the contents of the group so that you can work with it later. You can add a date as part of the name to help you keep your groups organized.

To archive information about an item group

- 1 Create a group. (For instructions, see [Creating an Item Group on page 187.](#))
- 2 Click **Archive**.

Horizon opens the Archive Data dialog box:



- 3 Enter a name in the **Group Name** field.
You can add a date as part of the name to help you keep your groups organized.
- 4 If you want to replace old archived data with new archived data, click **Groups** to choose from a list of previously archived groups.

Important: If you archive data using the same name as an existing group, you overwrite the original group. You also replace the original archived data with new data. Overwrite previously archived groups with caution.

- 5 Click **OK**.

Horizon displays an Archive Confirmation dialog box reminding you that only the data from the selected records will be archived. If you use an existing group name, Horizon also tells you that the entire group and all its previously archived data will be replaced.

Note: If you have not highlighted any rows, Horizon displays an Archive Confirmation dialog box that tells you that no records have been selected, that all members of the group will be archived, and that previously archived data will be replaced.

- 6 Click **OK**.

Horizon archives your group's data and creates a group associated with it.

Editing Information about an Item Group

Item Group Editor lets you make permanent or temporary changes in your database by changing the information in a specific field for multiple items all at once. Once you choose the items for your group, you can make changes in the items' cataloging information. If the changes are temporary and you want to restore the original

information at some later date, make sure that you archive the original information before making any changes. (For instructions, see [Archiving Information about an Item Group on page 193](#).) When you edit item information in Item Group Editor, the new information becomes part of your current library database.

You can use Item Group Editor to edit information in these fields for a group of items:

- Item Type
- Location
- Collection
- Call Type
- Call No.
- Source
- Price
- Item Note
- Item Status
- Internal Note



If you archive an item status of “i” (Checked In) or “s” (Shelving Cart) and you change it to any other status, the restore command cannot return the status to “i” or “s”.

Item Group Editor also lets you edit archived data. However, because archived data is information that you are holding to restore later, you should edit archived data only after careful thought and planning.

Here is an example of how you might edit archived data. If you want to set all Halloween materials to a shorter circulation period for the month of October, you can create a group named “Halloween” and archive its data. Then you can change the ITYPEs of the items in the group to reflect the shorter circulation period and change the call numbers to direct users to the display case. Later, you may decide that you want to include only Halloween videos in your Halloween group. You can restore the archived data for the original group, choose only the videos to create a new Halloween group, and re-archive the new Halloween group data, replacing the original archived data. You must change the ITYPE status and call number for the new Halloween group again and re-save the change. The ITYPE changes that you made in the first group change have been restored and are no longer in effect. If you saved those changes in a separate group with no archived data associated with it, you should delete that group since it now contains saved data that is no longer archived—only the new Halloween group information is archived. If you do not restore the first Halloween group’s archived data before you create the new Halloween group and re-archive the new group’s data under the same name (Halloween), you lose the original call numbers and ITYPE of all the items in the original group except the videos.



Remember that archived groups contain original information that you want to restore at a later date. Use caution when editing archived groups.

To edit information about an item group

1 Do one of these options to display an item group in the List Item Group Editor window:

- If you have not already created a group, create one. (For instructions, see [Creating an Item Group on page 187.](#))
- If you have previously created an item group, or want to use an existing group, do these steps:
 - Choose **Group, Retrieve Group.**

Horizon displays the Retrieve Group dialog box.

- Click **Groups** to choose from a list of existing groups.
- Choose the group that you want to display.

2 If you are making temporary changes, make sure that you archive the group information. (For instructions, see [Archiving Information about an Item Group on page 193.](#))

3 Highlight the items whose information you want to change. (To highlight all items in the group, choose **Edit, Select All.**)

4 Click **Edit.**

Horizon asks if you want to make a batch change to all the selected records.

If you have no items highlighted, Horizon displays the edit window for the item that the select arrow was pointing to when you clicked Edit.

5 Click **OK.**

Horizon displays an Item Group Editor window:

The window title bar may read “Edit Item Group Editor” if you are changing only one record. All other fields are the same.

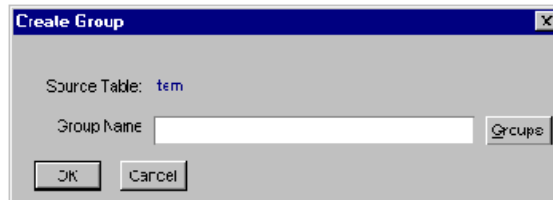
6 Enter any information that you want to change for all selected items in the group.

If you are not sure what information should go in a field, check with your system administrator.

7 Save your changes.

- 8 If you plan to make other changes to the group at a later date (other than restoring the original data), do these steps:
 - a Reselect the items that you changed.
 - b Choose **Group, Create Group** to save the group with the first set of changes.

Horizon opens the Create Group dialog box:



If you have previously retrieved or saved a group during this session, Horizon displays the name of that group in the Group Name field.

- c Do one of these options:
 - Enter a new name for the group in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.

- Click **Groups** to choose from a list of existing groups.

Note: If you use an existing group name to save your new group, Horizon replaces the existing group. You cannot recover any original information contained in that group. However, if the existing group references archived material, Horizon does not let you overwrite it; instead, Horizon returns you to the Create Group dialog box so that you can choose a different name.

- d Click **OK**.

Horizon returns to the List Item Group Editor window.

Restoring Information about an Item Group

Item Group Editor lets you restore item information from any data that you archive, as long as you have not overwritten the archived data by archiving another set of data with the same name. (If you overwrite or replace archived data, you lose the previously archived information.)



If you archive an item status of “i” (Checked In) or “s” (Shelving Cart) and you change it to any other status, the restore command cannot return the status to “i” or “s”.

You can choose to restore some item information while leaving other information as you changed it. Because Item Group Editor gives you so much flexibility, you may want to keep track of the item information that you archive and the changes that you make to the database. (For example, you could keep a list or a spreadsheet containing your changes and the names of the groups that contain them.)

When you restore archived data, you can choose whether to display a created group before you start restoring. If you display a created group before you restore data, you can choose which items and which archived information that you want to restore. If you do not display a created group before you restore data, you cannot choose which items that you want to restore, but you can choose which archived information that you want to restore.

To restore information about an item group

- 1 Start the **Item Group Editor** process.

The default location of this process is the **Administration/Group Editor Menu** folder on the navigation bar.

Horizon displays the List Item Group Editor window and a Compound Search window.

- 2 Click **Cancel** twice.

Horizon displays an empty List Item Group Editor window.

- 3 Do one of these options:

- If you do *not* want to display a saved group before you start restoring, continue with step 4.

Note: If the List Item Group Editor window already contains data, you must display the saved group that you want to restore or close Item Group Editor and reopen it to get an empty List Item Group Editor window.

- If you want to display a saved group before you start restoring, do these steps:

- a Choose **Group, Retrieve Group**.

Horizon displays the Retrieve Group dialog box.

- b In the **Group Name** field, enter the name of the group for which you want to restore information, or click **Groups** to choose from a list of existing groups. (You must choose the name of a group with archived data associated with it.)

- c Click **OK**.

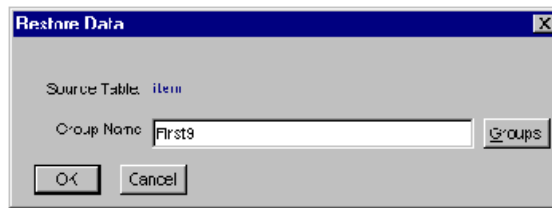
Horizon displays the group in the List Item Group Editor window.

- d Do one of these options:

- To restore information in selected rows, highlight the items for which you want to restore information.
- To restore information in all rows, do *not* highlight any items.

- 4 Click **Restore**.

Horizon displays the Restore Data dialog box:



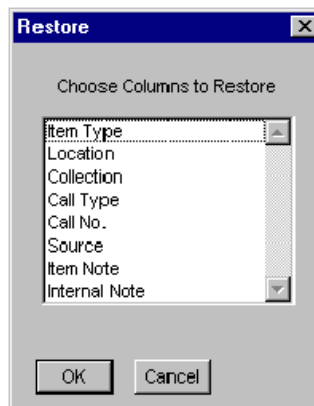
If you have a group open, Horizon displays the name of that group in the Group Name field, as in this example.

- 5 In the **Group Name** field, enter the name of the archived group that you want to restore, or click **Groups** to choose from a list of existing groups.
- 6 Click **OK**.

Depending on whether you highlighted items in the List Item Group Editor window, Horizon displays one of these messages:

- 7 Click **OK**.

Horizon displays the List Item Group Editor window with the group that you archived. It also displays a Restore dialog box:



- 8 Highlight the columns that contain the information that you want to restore.
- 9 Click **OK**.

Horizon displays the restored information in the List Item Group Editor window.

Clearing Archived Information about an Item Group

You can remove (or clear) archived data about an item group. You may want to clear archived data in these situations:

- You have archived groups that you no longer use.
- You have replaced one set of archived data with another set that you saved under a more descriptive name.
- You want to remove archived data about a group so you can use the group for something else.

Removing archived data is called clearing the archive.

Here is an example of how your library can use archive clearing. You may choose to archive data from a group of serials that you send to the bindery. Several of the serial subscriptions are discontinued and several others have been added, so the group is no longer valid. You can create a new group of the new serials and re-archive its information using a name that describes the new grouping. The old group, and the old archived data from that group, are now useless. You can clear the archive and delete the group.

When you archive data, Item Group Editor automatically creates a group that is associated with the archived data. Normally, this group functions in the background of the archive and restore functions, and you do not need to deal with it. However, if you clear an archive, the group still exists. Other users can access it. You may want to delete the Save Group if it is no longer necessary.



Make sure that no one else is using archived data or a group before you clear it or delete it. Once either one is gone, you cannot restore it.



If a group still references archived data, you cannot delete or overwrite it.

To clear archived information about an item group

- 1 Start the **Item Group Editor** process.

The default location of this process is the **Administration/Group Editor Menu** folder on the navigation bar.

Horizon displays the List Item Group Editor window and a Compound Search window.

- 2 Click **Cancel** twice.

Horizon displays an empty List Item Group Editor window.

- 3 Choose **Group, Clear Archive**.

Horizon displays the Clear Archived Data dialog box:

Clear Archived Data

Source Table: tem

Group Name Groups

OK Cancel

- 4 Enter the name of the archived group that you want to clear, or click **Groups** to choose from a list of existing groups.

- 5 Click **OK**.

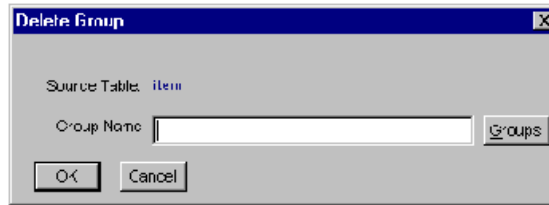
Horizon reminds you that the archived data associated with this group will be cleared.

6 Click **OK**.

Horizon returns to the List Item Group Editor window.

7 If you want to delete the group, choose **Group, Delete Group**.

Horizon displays the Delete Group dialog box:



8 Enter the name of the archived group that you just cleared, or click **Groups** to choose from a list of existing groups.

9 Click **OK**.

Horizon reminds you that the group will be deleted.

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