

Horizon 7.5.4

Reserve Bookroom User and Administrator Guide

September 2016



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09/2016

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Reserve Bookroom User and Administrator Guide

Welcome to Horizon Reserve Bookroom. Reserve Bookroom lets you reserve items for a specific instructor or the instructor’s students. These students can then use or check out the items for a limited amount of time during a school semester. This is helpful if an instructor needs to make a single item available to many students over the course of a school semester.

You can place both library-owned and non-library owned items on reserve. (For example, an instructor may want to make a personal copy of a play available to students.) You can place library-owned items on reserve by temporarily moving the item to the reserve location. You can place non-library owned items on reserve by creating a temporary Item record for use while you store the item in the reserve location.

The *Reserve Bookroom User’s Guide* is for all users and system administrators. It contains step-by-step instructions that explain how to install Reserve Bookroom and set up the necessary parameters and privileges in Horizon. It also explains how to use Reserve Bookroom to place items on reserve and track the items in the reserve location.

For more information about this guide, see these topics:

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Reserve Bookroom Guide Contents

This guide contains these major sections:

- [Getting Started on page 1](#) explains the basic information you need to begin using Reserve Bookroom, and gives you an overview of this guide.



- [Setting Up Your Horizon Database on page 13](#) explains how to set up Reserve Bookroom parameters and security on your Horizon system.
- [Setting Up Course and Instructor Records on page 22](#) explains how to create records for instructors and courses. It also explains how to add and remove courses and instructors from Instructor Course Title (ICT) records.
- [Reserving Library-Owned Items on page 32](#) explains how to place on reserve items that your library owns, or items in your main library catalog. It also explains the information you can change about an item after you place it on reserve.
- [Reserving Other Items on page 55](#) explains how to place on reserve items that your library does not own (for example, an instructor’s personal copy). It also explains the information you can change about an item after you place it on reserve.
- [Withdrawing Items from Reserve on page 71](#) explains how to withdraw items from reserve. It also explains how to set up withdrawal instructions and instructor letters. Finally it explains how to delete records from Reserve Bookroom.
- [Index](#) to this 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.
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 Reserve Bookroom. It gives you an overview of this guide, a review of some basic Horizon tasks and the Launcher interface, and an overview of Reserve Bookroom.

This chapter contains these sections:

Horizon Basics	1
Starting a Horizon Process	2
Customizing the Launcher	4
Reserve Bookroom Basics	5
Reserve Bookroom Processes	5
Basic Reserve Bookroom Tasks	6

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.



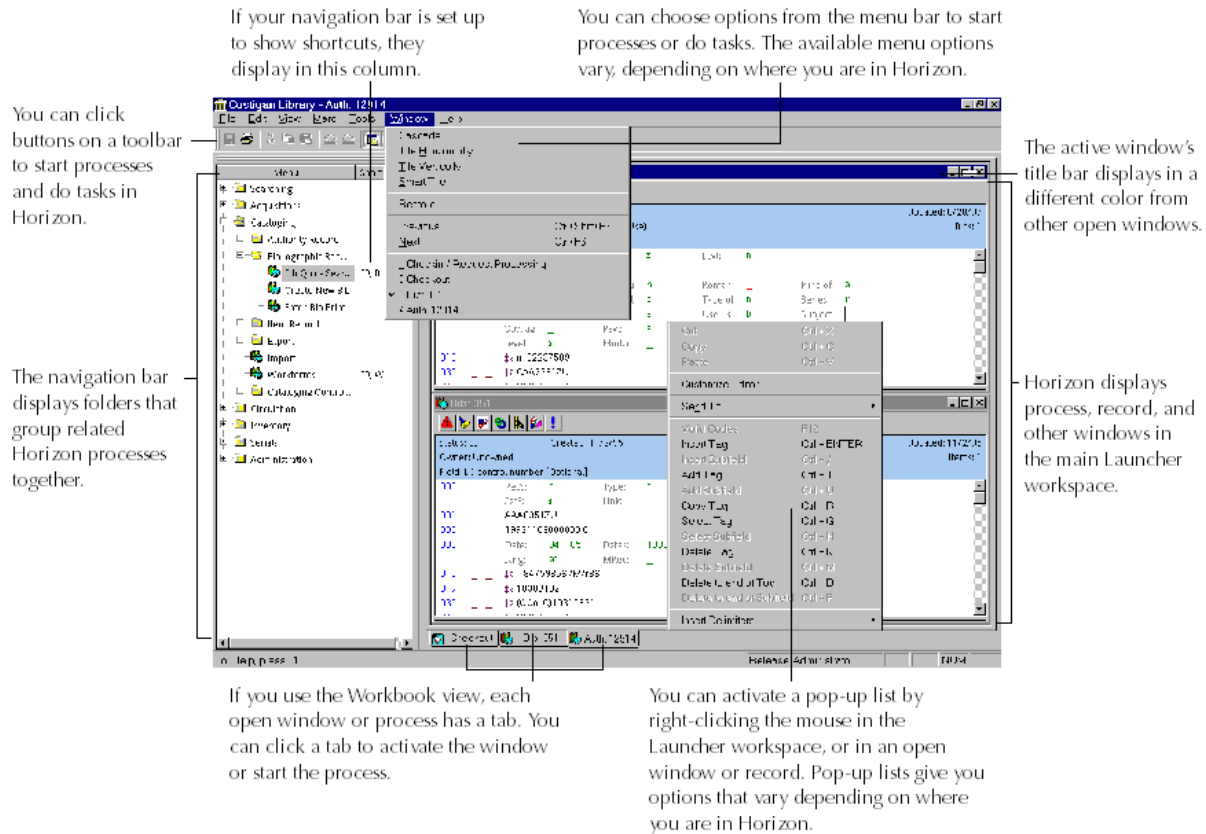
If you do not know how to do these tasks, see the [Windows online help](#), your [Microsoft Windows manual](#), or the *Horizon Basics Guide*.

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



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 2](#)
- [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.

Reserve Bookroom Basics

Reserve Bookroom lets you reserve items in a special location over a period of time. You can place on reserve library-owned items (items owned by your library) or other items (items not owned by your library). While an item is in reserve, you can determine the loan period and other circulation privileges for the item. (For example, you can set a loan period of two hours for reserve items.) You can reserve items for instructors and courses.

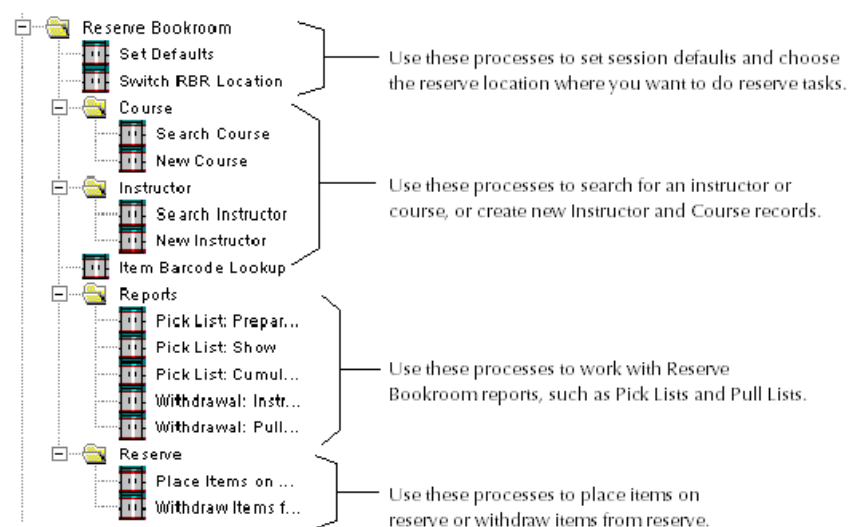
This section explains these topics:

- [Reserve Bookroom Processes on page 5](#)
- [Basic Reserve Bookroom Tasks on page 6](#)

Reserve Bookroom Processes

When you first install Horizon, the Reserve Bookroom folder on the navigation bar contains these folders and processes:

Figure 1-1: Reserve Bookroom Processes



You may see only some of these Reserve Bookroom processes 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*.)

Basic Reserve Bookroom Tasks

Reserve Bookroom includes reports and other Horizon features that let you place items on reserve, circulate reserve items, and withdraw items from reserve. In order to use Reserve Bookroom, you must set up a separate reserve location. You can do reserve tasks from the reserve location. When you log into Horizon, you can choose a default reserve location. After you log into Horizon you can switch to any reserve location you have set up.

In Reserve Bookroom you can create Instructor, Course, Title, and Item records. As you create these records, you can set session defaults that let you enter the same reserve information into several different records. After you create instructor and course records, you will routinely search for them as you do other Reserve Bookroom tasks, such as placing an item on reserve.

This section explains these topics:

- [Switching to a Reserve Location](#) on page 6
- [Setting Reserve Session Defaults](#) on page 7
- [Searching for a Course](#) on page 11
- [Searching for an Instructor](#) on page 12

Switching to a Reserve Location

In order to do reserve tasks, such as searching for a reserve instructor or course, you need to log in to the reserve location. The reserve location is a separate Horizon location in addition to your main library or other branches. (For instructions on setting up a reserve location, see [Setting Up a Reserve Location Record](#) on page 13.) If you set up a default reserve location, you can automatically do reserve tasks for that location after you log in to Horizon.

If you do not want to log in to the reserve location (for example, you may want to continue doing cataloging tasks in the main location), you can simply switch to a reserve location. This lets you do reserve tasks in the reserve location and non-reserve tasks in the location you are logged in to. This is also helpful if you have more than one reserve location. You can switch to a different reserve location without logging out of Horizon.



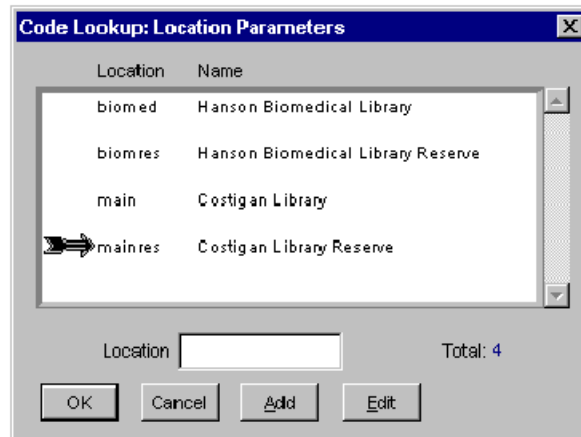
You may want to set the reserve location as the default location for Reserve Bookroom workstations. When users log in to Horizon on these workstations, Horizon automatically logs in to the reserve location. (For instructions, see the “Logging In to and Out of Horizon” in the “Getting Started” chapter of the *Horizon Basics Guide*.)

To switch to a reserve location

- 1 Start the **Switch RBR Location** process.

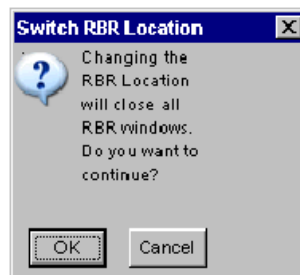
The default location of this process is the **Reserve Bookroom** folder on the navigation bar.

Horizon displays the Code Lookup Location Parameters window:



- 2 Choose the reserve location that you want to switch to.
- 3 Click **OK**.

If you have any Reserve Bookroom windows open, Horizon displays this message:



- 4 If Horizon displays the Switch RBR Location window, click **OK**.

Horizon closes all open windows and switches to the reserve location.

Setting Reserve Session Defaults

A reserve session is the period of time you are logged in to the reserve location to create reserve records or place items on reserve. If you need to create a large group of reserve records with similar information, you can set session defaults instead of entering the same information for each record. (For example, you can set the location default to be the same for all Item records that you create during a session.)

You can start a new session by setting different defaults at any time while you are doing reserve tasks. (For example, if you need to place a large number of videos on reserve, you can change the default ITYPE for this session to “video”.) You can save your settings for future sessions, or you can restore the original default settings.

If you set session defaults, Horizon automatically supplies the default information in reserve records when you work with Instructor and Course records. (For more information, see [About Setting Up Course and Instructor Records on page 22.](#)) Horizon also supplies the default information when you create reserve Title records and place items on reserve. (For more information, see [About Reserving Library-Owned Items on page 32](#) and [About Reserving Other Items on page 55.](#)) If necessary, you can change the default information as you work with individual reserve records.

To set reserve session defaults

- 1 If you have not already done so, switch to the reserve location. (For instructions, see [Switching to a Reserve Location on page 6.](#))
- 2 Start the **Set Defaults** process.

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

Horizon opens the Session Defaults window:

The screenshot shows the 'Session Defaults' dialog box with the following sections:

- ICT Defaults:** # Required, Date on Res., Date to Withdraw, Date to Reactivate.
- Item Defaults:** Location, Item Type, Collection, Withdr. Instr., and four 'Codes' buttons.
- Add Instructor to Course Default:** Radio buttons for 'add all or selected titles' (selected) and 'add new titles'.
- Add Course to Instructor Default:** Radio buttons for 'add all or selected titles' (selected) and 'add new titles'.
- Withdraw Catalog Action:** Radio buttons for 'None' (selected), 'Discard Item', 'Discard Item and Bib', 'Archive Item', and 'Archive Item and Bib'.
- Buttons:** OK, Cancel, Save Settings, and Restore Settings.

Annotations with arrows point to the buttons:

- An arrow points from the text 'Click OK to use these settings for the current session only.' to the OK button.
- An arrow points from the text 'Click Save Settings if you want to make these settings permanent.' to the Save Settings button.
- An arrow points from the text 'Click Restore Settings if you want to use the permanent session default settings.' to the Restore Settings button.

Note: Session defaults are not required. You can set some session defaults and leave other fields blank.

- 3 To set general defaults, complete or update these fields:

Field	Action
# Required	Enter the number of items that you need to place on reserve for each title during this session. (For example, enter “2” if you typically place two copies of the same title on reserve.)
Date on Res.	Enter the date that the items need to go on reserve.
Date to Withdraw	Enter the date that the items need to be withdrawn from reserve. (After this date, Day End automatically changes the status of the item to “inactive.” For more information about this status, see Inactivating a Reserve Title on page 77 .) Note: You must enter a withdrawal date if you plan to print instructor letters. (For more information, see Printing Instructor Letters on page 74 .)
Date to Reactivate	Enter the date that the items need to go back on reserve. (After this date, Day End automatically changes the status of the item to “active.” For more information about this status, see Using a Pick List Report on page 42 or Editing Reserve Information for a Title on page 62 .)

4 To set course and instructor defaults, complete or update these groups:

Group	Action
Add Instructor to Course Default	Do one of these options: <ul style="list-style-type: none"> If you want the option to add some or all of the titles linked to an instructor when you add an instructor to a course, mark add all or selected title. If you do <i>not</i> want to add any titles linked to an instructor when you add an instructor to course, mark add new titles. For more information, see Adding an Instructor to a Course on page 28 .
Add Course to Instructor Default	Do one of these options: <ul style="list-style-type: none"> If you want the option to add some or all of the titles linked to a course when you add a course to an instructor, mark add all or selected title. If you do <i>not</i> want to add any titles linked to a course when you add a course to an instructor, mark add new titles. (For more information, see Adding a Course to an Instructor on page 26 .)

5 To set item defaults, complete or update these fields and options:

Field	Action
Location	<p>Enter the reserve location that you want these items to belong to, or click Codes to choose from a list. (This is helpful if you have more than one reserve location.)</p>
Item Type	<p>Enter the item type (ITYPE) that you want items to be when you place them on reserve, or click Codes to choose from a list. (ITYPE determines the loan period for an item.)</p>
Collection	<p>Enter the collection that you want these items to belong to in the reserve location, or click Codes to choose from a list.</p>
Withdr. Instr.	<p>Click Codes and choose the withdrawal instruction that you want to use for these items, or to create new instructions. (For more information, see Setting Up Withdrawal Instructions on page 72.)</p>
Withdraw Catalog Action	<p>Choose one of these options:</p> <ul style="list-style-type: none"> • None. If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option. • Discard Item. If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Discard Item and Bib. If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Archive Item. If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option. • Archive Item and Bib. If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option. (If more than one item is linked to the title, you cannot archive the Title record.) <p>Important: If you are working with library-owned items, do <i>not</i> mark the “Discard Item” or “Discard Item and Bib” options; otherwise, when you withdraw library-owned items, Horizon deletes the Item or Title records from your system. (For more information, see Choosing a Withdrawal Cataloging Action on page 78.)</p>

6 Do one of these options:

Save these default settings for this session only	Make these default settings permanent
Click OK . The original settings return when you start Horizon again.	Click Save Settings . These settings remain in Horizon until you click Save Settings again.

Searching for a Course

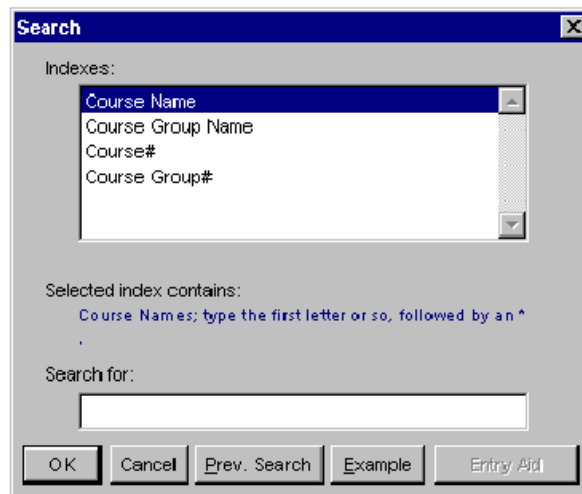
After you create a Course record, you can search for the record in Reserve Bookroom. You search for Course records when you add an instructor to a course, create reserve titles, and place items on reserve.

To search for a course

- 1 Start the **Search Course** process.

The default location of this process is the **Reserve Bookroom/Course** folder on the navigation bar.

Horizon opens this Search window:



- 2 Choose a search index.
For example, you can search an index of course numbers.
- 3 Do one of these options:
 - Enter the name, or other identifying information, of the course in the **Search for** field.
 - Enter an asterisk (*) in the **Search for** field to see a list of all courses.
- 4 Click **OK**.
- 5 If Horizon displays a list of courses, choose the one you want.
- 6 Continue with your task.

Searching for an Instructor

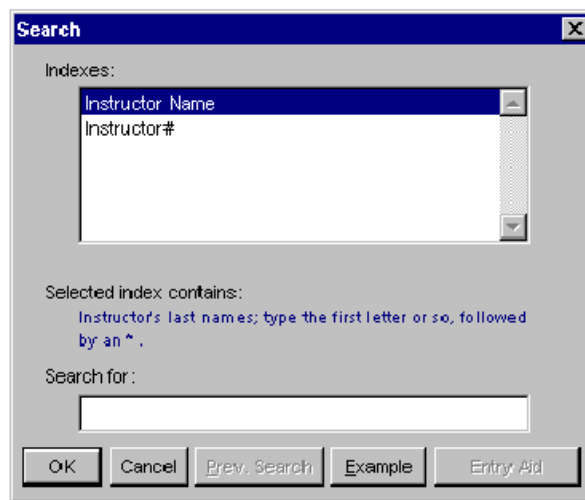
After you create an Instructor record, you can search for the record in Reserve Bookroom. You search for Instructor records when you add a course to an instructor, create reserve titles, and place items on reserve.

To search for an instructor

- 1 Start the **Search Instructor** process.

The default location of this process is the **Reserve Bookroom/Instructor** folder on the navigation bar.

Horizon opens this Search window:



- 2 Choose a search index.

For example, you can search an index of instructor names.

- 3 Do one of these options:

- Enter the name, or other identifying information, of the instructor in the **Search for** field.
- Enter an asterisk (*) in the **Search for** field to see a list of all instructors.

- 4 Click **OK**.

- 5 If Horizon displays a list of instructors, choose the one you want.

- 6 Continue with your task.

Chapter 2: Setting Up Your Horizon Database

This chapter explains how to set parameters in Horizon that affect Reserve Bookroom, such as the reserve location for each PAC flavor.

This chapter contains these sections:

- [About Setting Up Your Horizon Database](#) on page 13
- [Setting Up a Reserve Location Record](#) on page 13
- [Defining Reserve Circulation Privileges](#) on page 15
- [Assigning Reserve Locations to a PAC Flavor](#) on page 17
- [Determining Reserve Item Statuses](#) on page 18
- [Setting Up Reserve Bookroom Security](#) on page 20

About Setting Up Your Horizon Database

Before you can reserve items by instructor or course, and before you can let users check out reserve items, you need to set up Reserve Bookroom parameters to govern these functions. Some setup tasks affect Horizon generally and others are specific to Reserve Bookroom.

Setting Up a Reserve Location Record

When you place items on reserve, the item's location temporarily changes to the Reserve Location. Having a separate Location record for reserve instructors, courses, and items lets you keep instructor, course, and item circulation privileges separate from the library's main location. (For example, you can set up reserve loan periods and fine rates that are different for items housed at their regular location, such as the main stacks.)

Most of the fields on the Location record are explained in the *System Administration Guide*. (For more information and instructions on completing these fields, see "Setting Up Parameters for a Reserve Location" in the "General Setup" chapter in the *System Administration Guide*.)

These are the fields on the Location record that you can set up for Reserve Bookroom:

Field	Action
Location Code	Enter the code for the reserve location. This code can be up to seven characters. (For example, enter “mainres”.)
Name	Enter the name of the reserve location. For example, enter “Main Location Reserve”.
Instructor Letter	Enter the text you want to use to notify instructors when their items will be removed from the reserve location and give them any other instructions. For example, you can explain how to keep an item in reserve, or who to contact.) (For more information, see Printing Instructor Letters on page 74 .)
CKI Note on RB	Enter the text you want to display in Circulation when an item flagged for reserve is checked. For example, enter “Send item to the reserve location.” (For more information, see Flagging Items for Reserve on page 40 .)
CKI Note on RW	Enter the text you want to display in Circulation when an item flagged for withdrawal from reserve is checked in. For example, enter “Return to Reserve for withdrawal”. (For more information, see Flagging Items for Withdrawal on page 83 .)
Inst. Mailing Label	Enter the type of label you want to use for sending withdrawal notices to instructors, or click Codes to choose from a list.
Default Reserve Location	Enter the code for the reserve location you are setting up, or click Codes to choose from a list. You should also set up the default reserve location for your main location. (For example, if you have two reserve locations, “Main Reserve” and “Medical Reserve”, you can make “Medical Reserve” the default reserve location.) When you log in to the main location, you can begin doing reserve tasks in the reserve location without first switching to the reserve location.) (For more information, see Switching to a Reserve Location on page 6 . For instructions on setting up your main locations, see “Setting Up a Location Record” in the “General Setup” chapter of the <i>System Administration Guide</i> .)

Defining Reserve Circulation Privileges

You can set up circulation privileges for reserve items that are different from the privileges for normal items. Circulation privileges include loan periods, fine rates, notices, renewal guidelines, and so forth. You can set up unique circulation privileges for each reserve location group using the `circ_privilege_code` view in the Table Editor. (For more information about circulation privileges and instructions on defining them, see the *Circulation Setup Guide*.)

You must define these circulation privileges for each reserve location group:

Privilege	Description
Loan Period	Determines how long most borrowers can check out most items.
Renewal Period	Determines the length of time for which borrowers may renew items.
Maximum Number of Renewals	Determines how many renewals, including phone renewals, most borrowers can make for a single item.
Maximum Number of Phone Renewals	Determines how many renewals most borrowers can make by telephone for a single item.
Hold Period	Determines how many days most items remain with a “hold” status before Day End cancels the hold.
Grace Period	Determines how long most items can be overdue before the borrower is fined. Note: The grace period includes days the library is closed.
Fine Rate	Determines the amount most borrowers must pay for most overdue items per day or hour. (You can specify the loan type, day or hour, in each ITYPE record.)
First Notice Delay	Determines how many days after an item becomes due before Horizon generates the first overdue notice for that borrower type.
Notice Interval	Determines the number of days between subsequent notices.

Privilege	Description
Maximum Number of Notices	<p>Determines how many overdue notices are sent to most borrowers.</p> <p>Note: The maximum number of overdue notices you specify here should not exceed the number of overdue notices defined in block types. (For example, if you have defined three overdue notices in block types, you should set Maximum Number of Notices no higher than “3”.)</p>
Maximum Number of Items Out	<p>Determines how many items most borrowers can have checked out at any given time.</p>
Suspend Days	<p>This value, multiplied by the number of days an item is overdue, determines the number of days Horizon suspends a borrower’s circulation privileges.</p> <p>(For example, if borrower suspension is set at “5”, borrowing privileges will be suspended for five days for every day an item is over due.)</p>
Guaranteed Loan Period	<p>Determines the number of days, hours, or minutes borrowers are guaranteed to have an item.</p> <p>(Recalls placed on the item generate a due date beyond the guaranteed loan period.)</p>
Recall Loan Period	<p>Determines the number of days, hours, or minutes a borrower has in order to return a recalled item.</p>
Recall Fine Rate	<p>Determines how much most borrowers must pay per day or hour for overdue recalled items.</p> <p>(You specify the loan type, day or hour, in each ITYPE record.)</p>
First Recall Notice Delay	<p>Determines how long after a recalled item becomes overdue before Horizon generates a first recall notice for most borrowers.</p>
Recall Notice Interval	<p>Determines the number of days between subsequent recall notices.</p>
Maximum Number of Recall Notices	<p>Determines the maximum number of recall notices sent to a borrower. This works with the block table.</p>
Allow OPAC Renewals	<p>Lets borrowers renew items for themselves using Horizon Information Portal.</p>
Max OPAC Renewals	<p>Determines the maximum number of renewals a borrower can make for himself or herself using Information Portal.</p>

Privilege	Description
Allow Ovrld. OPAC Renewals	Lets borrowers renew items that are currently overdue for themselves using Information Portal.

Assigning Reserve Locations to a PAC Flavor

Reserve items can belong to only one reserve location. Users must search the correct reserve location to find items that belong to that location. When staff members, instructors, and students search for reserve items, they can choose the reserve location they want to search.

The PAC flavor for the user determines which reserve locations the user can search. (For example, you may give staff members a choice between the main reserve library and the reserve library on another campus, while you let students search only the main reserve library.) You can specify the reserve locations available for each PAC flavor.

To assign reserve locations to a PAC flavor

- 1 Start the **PAC Flavor Table** process.

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

Horizon opens the List Public Access Flavor window.

- 2 Do one of these options:

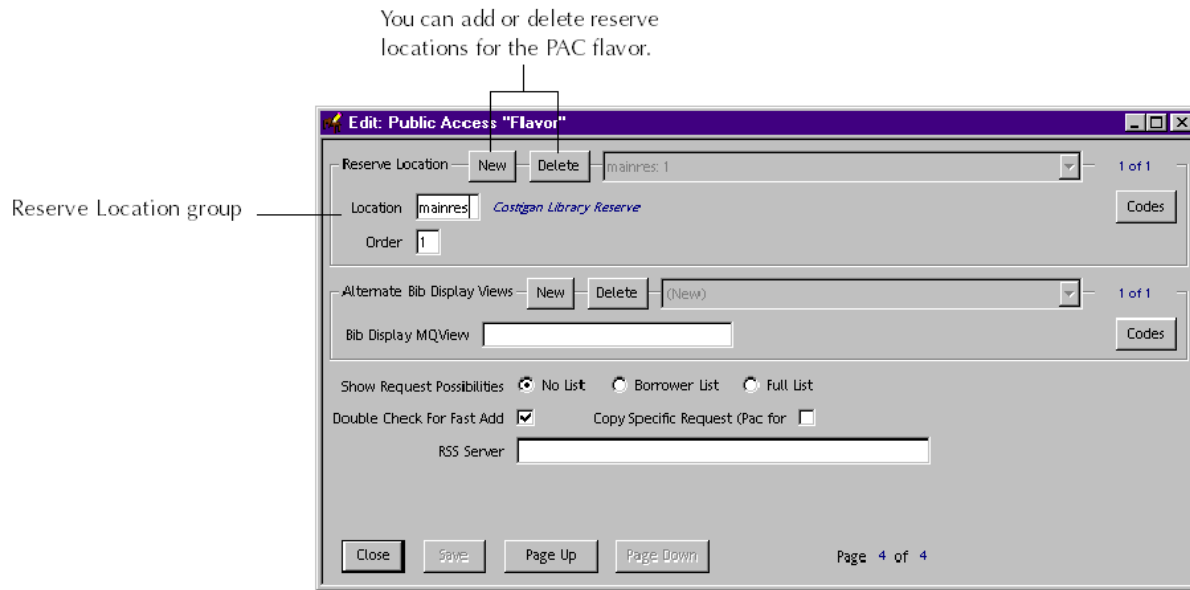
- Click **New** to create a new flavor.

For instructions on creating a new flavor, see the “PAC Flavors” section of the “Searching Setup” chapter in the *System Administration Guide*.

- Choose the PAC flavor you want to edit, then click **Edit**.

Horizon opens the Edit Public Access Flavor window.

- 3 Click **Page Down**, or resize the window to display the **Reserve Location** group:



4 Do one of these options:

Add a reserve location to this PAC flavor	Remove a reserve location from this PAC flavor
<ol style="list-style-type: none"> 1. Click New. 2. Enter the reserve location you want to assign to this PAC flavor in the Location field, or click Codes to choose from a list. 3. Enter a number in the Order field. Horizon displays a list of reserve locations in order when users choose a reserve location to search. 4. Repeat steps 1 through 3 in this table for each reserve location you want add. 	<ol style="list-style-type: none"> 1. Choose the location from the drop-down list. 2. Click Delete.

5 Save your changes.

You must restart Horizon for your changes to take effect.

Determining Reserve Item Statuses

An item's status, in conjunction with the item's location, indicates where an item is in the reserve process. You determine which items can be placed on reserve according to the item's status. Staff members can reserve only those items with statuses that you determine. (For example, you may let staff members place an item on reserve that is checked in to the main location, while you prevent them from placing items on reserve that are currently missing from the main library.)

You can choose to let staff members reserve items with any item status; however, there are only a few statuses that logically apply to reserve items. This table lists some item statuses that may apply to reserve items:

Status	Location	Explanation
Reserve Bookroom (rb)	Owning (the item's normal location, such as "main")	An item with this status is flagged for reserve but is not yet available to circulate in the Reserve Bookroom. The item is library-owned and still in the main stacks. Items with this status show up on the Pick List report. This report shows you which items you need to retrieve from the owning location and place on reserve. (For more information, see Using a Pick List Report on page 42.)
Reserve Bookroom (rb)	Reserve	An item with this status is checked in to the reserve location, but has been flagged for withdrawal from reserve. (For more information, see Flagging Items for Withdrawal on page 83.)
Checked In (i)	Owning (the item's normal location, such as "main")	An item with this status is checked in at the main location. After you retrieve the item from the owning location, you can place it on reserve. (For more information, see Placing an Item on Reserve on page 35.)
Checked In (i)	Reserve	An item with this status has been placed on reserve and is available for circulation at the reserve location.
Reserve withdrawal (rw)	Reserve	An item with this status has been flagged for withdrawal from reserve. After the item is returned, you can withdraw it from the reserve location and return it to the main location or owner. When you check in an item that has been flagged for withdrawal, Horizon updates the item status to "rw." Items with this status show up on the Pull List report. This report shows you which items you need to remove from the reserve location. (For more information, see Using a Pull List Report on page 85.)

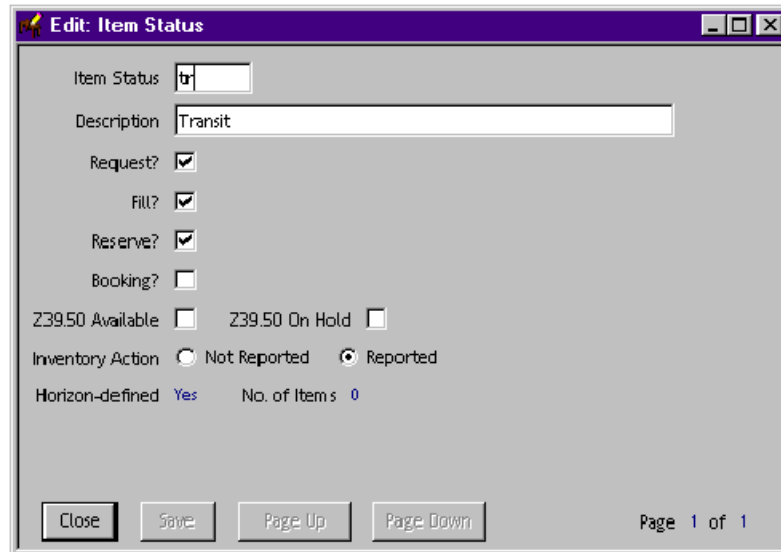
To determine reserve item statuses

- 1 Open the **item_status** view in the Table Editor.
 - a Double-click the **Table Editor** process in the **Administration** folder.
 - b Start entering "item_status" in the **Mq View** field.
The selection arrow moves to the view name that you want.
 - c Click **OK**.

Horizon opens the List Item Status window.

- 2 Highlight the item status you want to use for Reserve Bookroom.
- 3 Click **Edit**.

Horizon opens the Edit Item Status window:



- 4 Mark the **Reserve** box.
- 5 Save your changes.
- 6 Repeat steps 2 through 5 for each status you want to use for Reserve Bookroom.

Setting Up Reserve Bookroom Security

Horizon security lets you control access to Reserve Bookroom functions and processes and keep track of which users are performing the functions. You can determine which users can access a function by setting up passkey and role privileges related to Reserve Bookroom for each reserve location.

You may need to give users access to these passkey privileges:

Passkey Privilege	Passkey Privilege
Access item archives	Delete instructor record
Access items list from ICT	Edit ICT record
Copy borrower record	Edit item
Copy course record	Flag item for reserve
Copy instructor record	Flag items for withdrawal
Create new ICT record	Link course to instructor

Passkey Privilege	Passkey Privilege
Create new item	Link instructor to course
Create short bib	Print spine labels
Delete course record	Unarchive an item

You may need to give users access to these role privileges:

Role Privilege	Role Privilege
Access Titles	Items Withdraw
Course Edit	Location Switch
Course New	Pick List Cumulative Report
Instructor Edit	Pick List Prepare and Show
Instructor Letter Withdrawal	Pick List Show
Instructor New	Pull List Withdrawal
Items Reserve	Set Defaults

For more information about passkey and role privileges, and instructions on securing Reserve Bookroom functions, see the “Securing Horizon” section in the “Security and Preferences” chapter of the *System Administration Guide*.

Chapter 3: Setting Up Course and Instructor Records

This chapter explains how to work with Instructor and Course records in Reserve Bookroom.

This chapter contains these sections:

- [About Setting Up Course and Instructor Records](#) on page 22
- [Setting Up or Changing an Instructor Record](#) on page 22
- [Setting Up or Changing a Course Record](#) on page 24
- [Adding a Course to an Instructor](#) on page 26
- [Adding an Instructor to a Course](#) on page 28
- [Removing an Instructor from a Course](#) on page 29
- [Removing a Course from an Instructor](#) on page 30

About Setting Up Course and Instructor Records

Reserve records let you keep track of instructors and courses for which you reserve items. You can reserve items for any instructor that is associated with a course. (For example, if an instructor employs an aide to help teach a course, you can create an Instructor record for the aid and reserve items for the course he or she teaches.)

Course records contain details about a course, such as the course name, description, and number of instructors that teach the course. Instructor records contain details about an instructor, such as the instructor's name, address (office and department), instructor number, and other information.



Remember that you must do all reserve tasks in the reserve location. (For instructions on switching to a reserve location, see [Switching to a Reserve Location](#) on page 6.)

Setting Up or Changing an Instructor Record

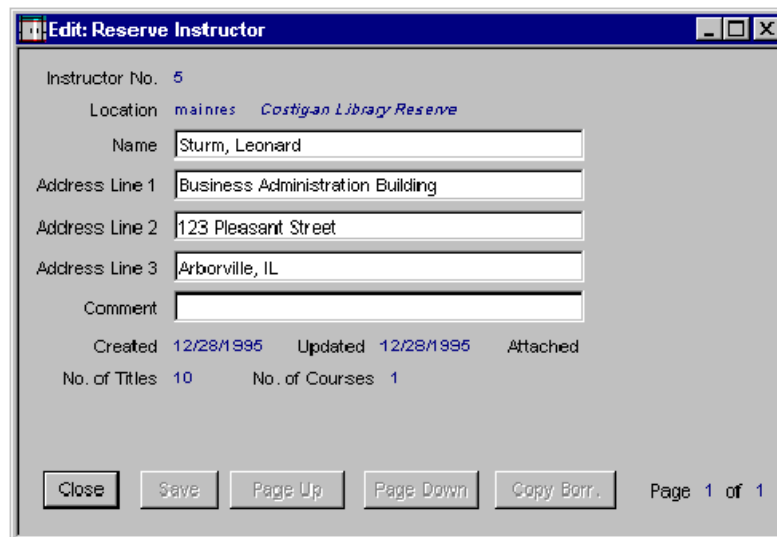
Instructor records let you place items on reserve for instructors and let students search for reserve items by instructor. An Instructor record includes the instructor's name and address or campus location. You can create new Instructor records as well as edit existing ones. If you already have information about an instructor in your Borrower records, you can copy the instructor's information from the Borrower record to the Instructor record.

To set up or change an instructor record

1 Do one of these options:

Add a new instructor	Copy a Borrower record	Edit an Instructor record
<p>Start the New Instructor process.</p> <p>The default location of this process is the Reserve Bookroom\Instructor folder on the navigation bar.</p>	<ol style="list-style-type: none"> 1. Start the New Instructor process. The default location of this process is the Reserve Bookroom\Instructor folder on the navigation bar. Horizon opens the Edit Reserve Instructor window. 2. Click Copy Borr. 3. Search for the instructor as a borrower. (For instructions, see Searching for an Instructor on page 12.) 4. If Horizon displays a list of borrowers, choose the instructor from the list. 5. Click OK. Horizon imports the information into the Instructor record. 	<p>If you want to change information for an existing instructor, search for the instructor.</p> <p>For instructions, see Searching for an Instructor on page 12.</p>

Horizon opens the Edit Reserve Instructor window:



2 Complete or update these fields:

Field	Action
Name	Enter the instructor's name.
Address Line 1	Enter the first line of the instructor's address.

Field	Action
Address Line 2	Enter the second line of the instructor's address.
Address Line 3	Enter the third line of the instructor's address.
Comment	Enter any comments about the instructor.

- 3 Save your changes.

Setting Up or Changing a Course Record

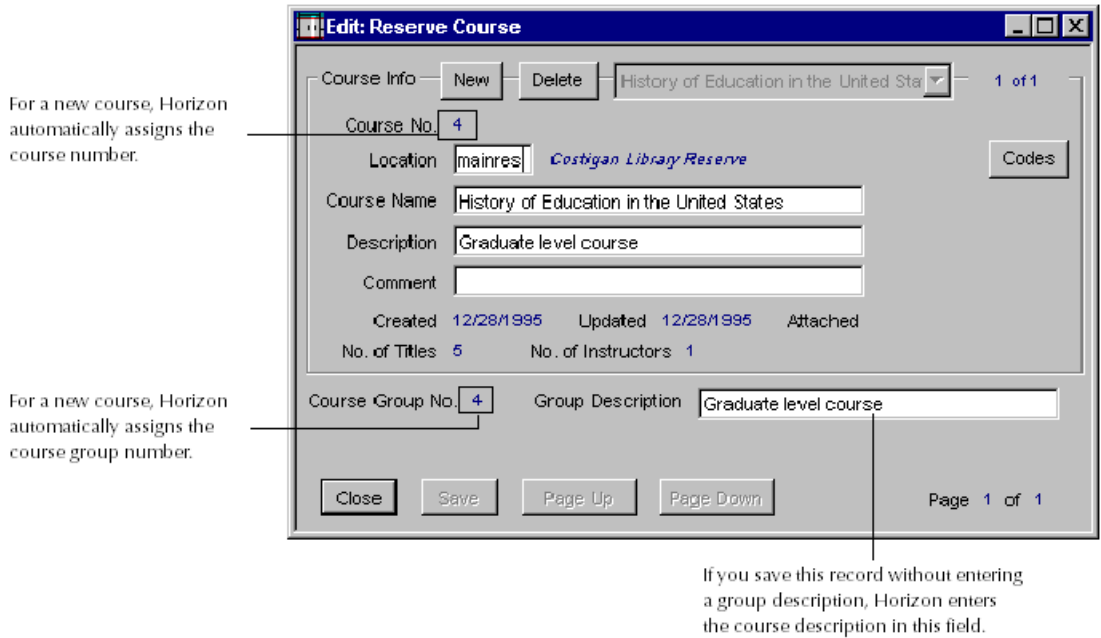
Course records let you reserve items for an instructor for a specific course he or she teaches. A Course record includes the course's name and description. Students can search for reserve items based on the course name or description. You can create new Course records as well as edit existing ones. If necessary, you can assign more than one name to the same course. (For example, the same calculus course may be listed as both Mathematics 300 and Physics 328.)

To set up or change a course record

- 1 Do one of these options:

Add a new course	Edit a Course record
Start the New Course process. The default location of this process is the Reserve Bookroom\Course folder on the navigation bar.	If you want to change information for an existing course, search for the course. For instructions, see Searching for a Course on page 11 .

Horizon opens the Edit Reserve Course window:



2 Complete or update these fields:

Field	Action
Location	Enter the location where you want to store this record, or click Codes to choose from a list. (For example, enter “main reserve”.)
Course Name	Enter the name of the course. (For example, enter “Math 101”.)
Description	Enter a description of the course. (For example, enter “Math Theory required for all freshmen”.)
Comment	Enter any comments about the course.
Group Description	If this course has multiple names, or sections, enter a description for the group of course names. (For example, enter “Introduction to math theory”.)

3 Save your changes.

If you add a new course, Horizon automatically assigns the course number and group number.

4 If the course has multiple names, or sections, do these steps:

- a** In the **Course Info** group, click **New**.

Horizon displays a blank record.

- b** Enter the alternate name in the **Course Name** field.
- c** Complete the remaining fields with new information or the same information you entered in step 2 of this task.
- d** Save your changes.

Horizon adds the new course name and information:

The screenshot shows the 'Edit: Reserve Course' window. The 'Course Name' field is set to 'Economics 101'. The 'Description' field is 'Required for all Economics majors'. The 'Created' date is 12/28/1995 and the 'Updated' date is 04/16/2002. The 'Course No.' is 5 and the 'Location' is 'mainres'. The 'Course Group No.' is 5 and the 'Group Description' is 'Introduction to math theory'. The window has buttons for 'Close', 'Save', 'Page Up', and 'Page Down'. A callout box points to the dropdown menu with the text 'Click here to see all of the course names.'

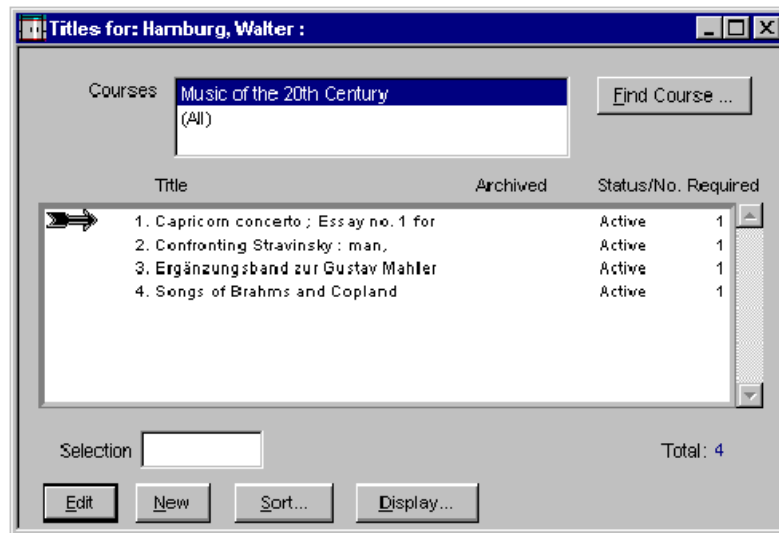
Adding a Course to an Instructor

Before you can reserve items for an instructor, you must link one or more courses to the instructor. Once you link these records, the course remains linked to the instructor. You can have more than one instructor linked to the same course. (For instructions, see [Adding an Instructor to a Course on page 28.](#))

To add a course to an instructor

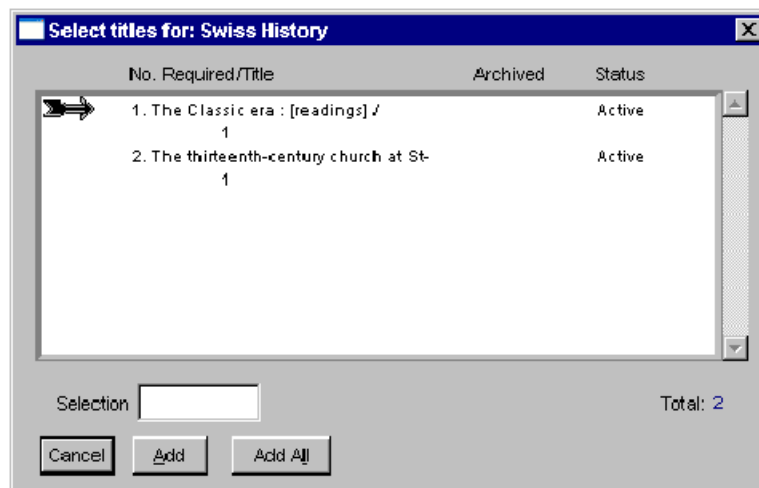
- 1 Search for the instructor to whom you want to add the course.
- 2 If Horizon displays a list of instructors, choose the one you want.
- 3 Click **Titles**.

Horizon displays the courses and titles linked to the instructor:



- 4 Click **Find Course**.
- 5 Choose the course you want to add to the instructor.
- 6 Click **Found**.

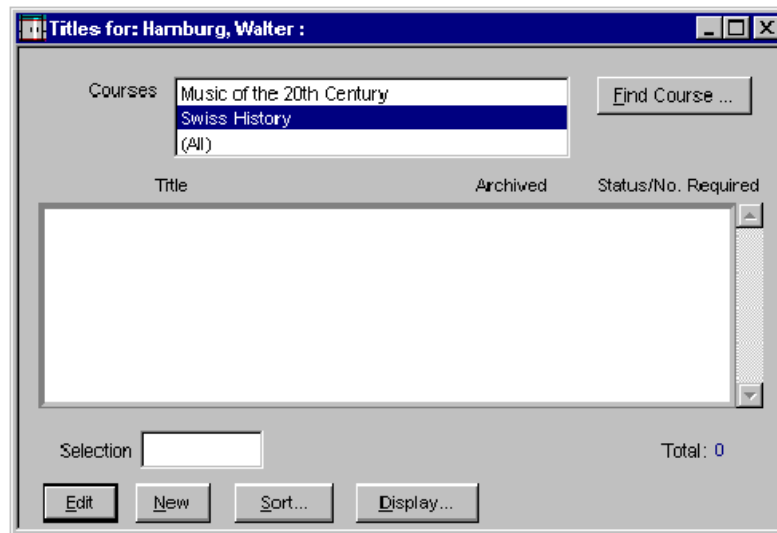
If your Add Course to Instructor default is set to “add all or selected titles”, Horizon displays the Select Titles for *Course* window:



For instructions on setting session defaults, see [Setting Reserve Session Defaults](#) on page 7.

- 7 If Horizon displays the Select Titles for *Course* window, do one of these options:
 - If you want to link only certain titles to the instructor, highlight the titles, then click **Add**.
 - If you want to link all of the titles to the instructor, click **Add All**.

Horizon adds the course and selected titles to the instructor:



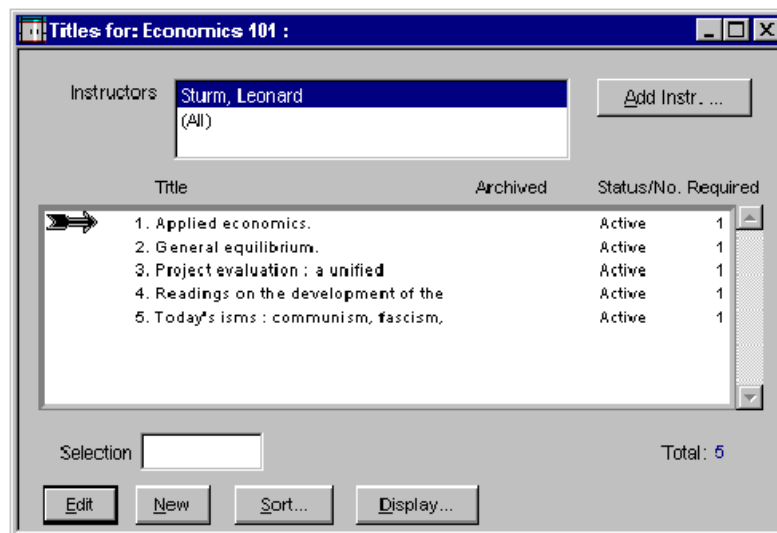
Adding an Instructor to a Course

If a course is taught by more than one instructor, you can link additional instructors to the course. (For example, an instructor might have an assistant that teaches a course, or a different instructor might teach the course depending on the semester.) You can reserve items for all instructors linked to a course.

To add an instructor to a course

- 1 Search for the course to which you want to add the instructor.
- 2 If Horizon displays a list of courses, choose the one you want.
- 3 Click **Titles**.

Horizon displays the instructors and titles linked to the course:



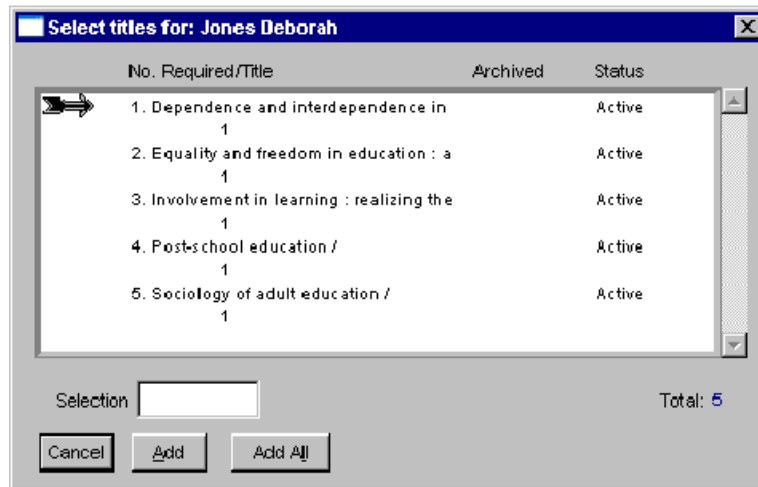
4 Click Add Instr.

Horizon displays the List Reserve Instructor window.

5 Choose the instructor whom you want to add to the course.

6 Click Found.

If your Add Instructor to Course default is set to “add all or selected titles”, Horizon displays the Select Titles for *Instructor* window:



For instructions on setting session defaults, see [Setting Reserve Session Defaults on page 7](#).

7 If Horizon displays the Select Titles for *Instructor* window, do one of these options:

- If you want to link only certain titles to the instructor, highlight the titles, then click **Add**.
- If you want to link all of the titles to the instructor, click **Add All**.

Horizon adds the instructor and selected titles to the course:

Removing an Instructor from a Course

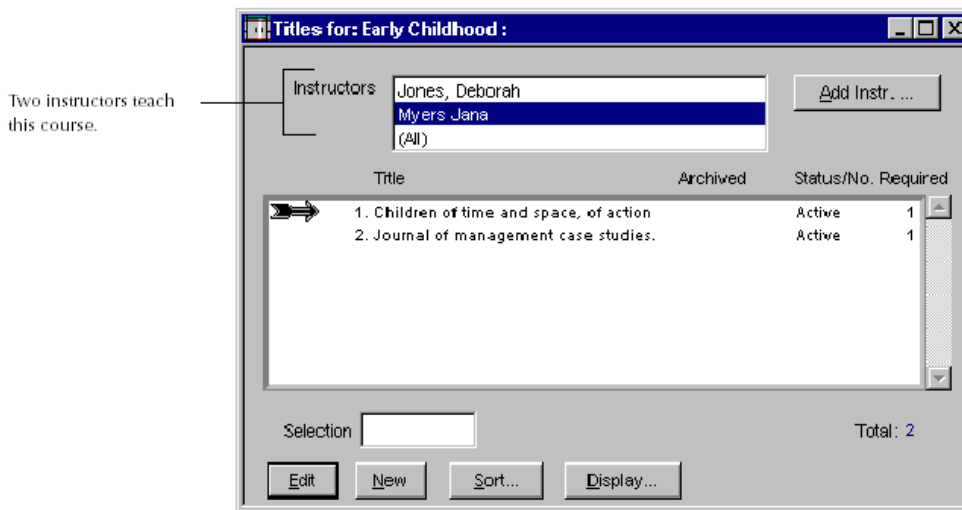
If necessary, you can remove an instructor from a course without deleting the Instructor record from Reserve Bookroom. (For example, you may want to remove an instructor from a course if the instructor no longer teaches that course.)

To remove an instructor from a course

1 Search for the course from which you want to remove the instructor.

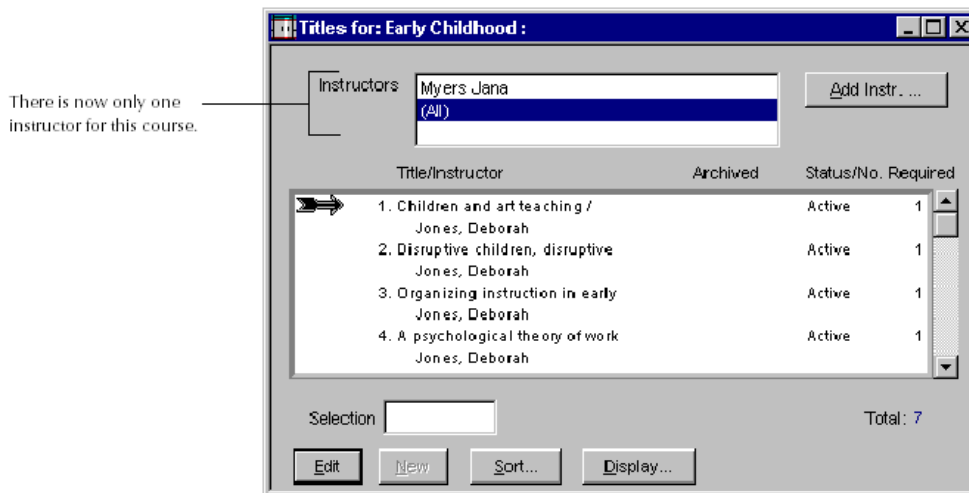
2 Click Titles.

Horizon displays the Titles for *Course* window:



- 3 Highlight the instructor whom you want to unlink from the course.
- 4 If there are any titles attached to the instructor, unlink each title. (For instructions, see [Unlinking a Reserve Title on page 88.](#))

Horizon automatically removes the instructor from the course.



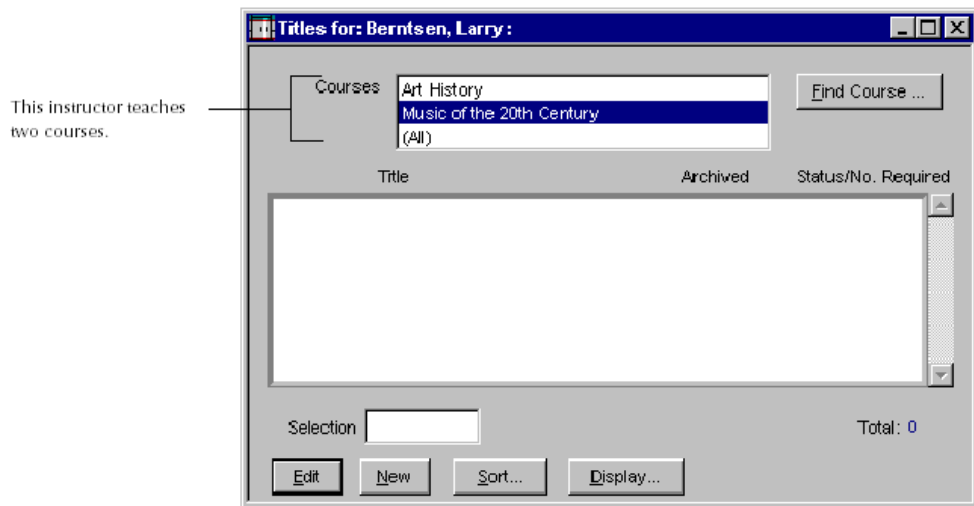
Removing a Course from an Instructor

If necessary, you can remove a course from an instructor without deleting the Course record from Reserve Bookroom. (For example, you may want to remove a course from an instructor if the instructor no longer teaches that course.)

To remove a course from an instructor

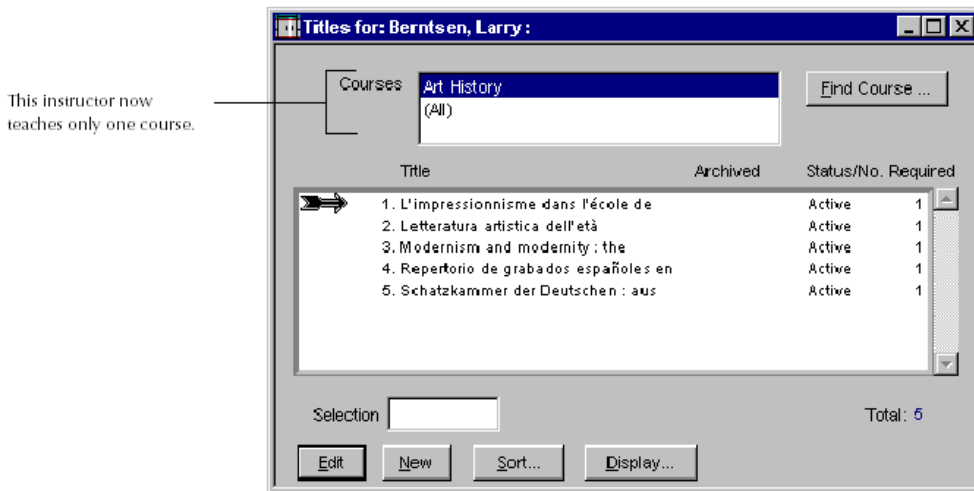
- 1 Search for the instructor from whom you want to remove the course.
- 2 Click **Titles**.

Horizon displays the Titles for *Instructor* window:



- 3 Highlight the course that you want to unlink from the instructor.
- 4 If there are any titles attached to the course, unlink each title. (For instructions, see [Unlinking a Reserve Title on page 88.](#))

Horizon automatically removes the course from the instructor.



Chapter 4: Reserving Library-Owned Items

This chapter explains how to prepare items that your library owns for reserve. It also explains how to place these items on reserve.

This chapter contains these sections:

- [About Reserving Library-Owned Items](#) on page 32
- [Creating a Reserve Title Record](#) on page 33
- [Placing an Item on Reserve](#) on page 35
- [Flagging Items for Reserve](#) on page 40
- [Using a Pick List Report](#) on page 42
- [Editing Reserve Information for a Title](#) on page 43
- [Changing Reserve Item Records](#) on page 46

About Reserving Library-Owned Items

After you create Instructor and Course records, you can place items from your library catalog on reserve. You can reserve an item for an instructor or course after you retrieve the item from your main location. You may require an instructor to bring the item to the reserve location or you may have staff members that search for items that instructors want to place on reserve.

Once you place an item on reserve, you can circulate reserve items according to the circulation parameters you set up for your reserve location and the ITYPE of reserve items. (For more information, see [Defining Reserve Circulation Privileges](#) on page 15.)

If a library-owned item is currently checked out, but you need to place it on reserve, you can flag the item for reserve. When the item is checked in at the circulation desk, Horizon prompts staff members to place the item on reserve.



Remember that you must do all reserve tasks in the reserve location. (For instructions on switching to a reserve location, see [Switching to a Reserve Location](#) on page 6.)

Creating a Reserve Title Record

Before you can reserve items for an instructor, you need to link the titles of the items to a course that the instructor teaches. You can link existing titles from your library catalog to an instructor or course. Horizon creates an Instructor/Course/Title (ICT) record that links an instructor, course, and title together. Users can then search for items by instructor, course, or title.

To create a reserve Title record

- 1 Search for the course to which you want to link a title.

Note: You can also create a reserve Title record by first searching for the instructor and then choosing the course that you want to add the title to.

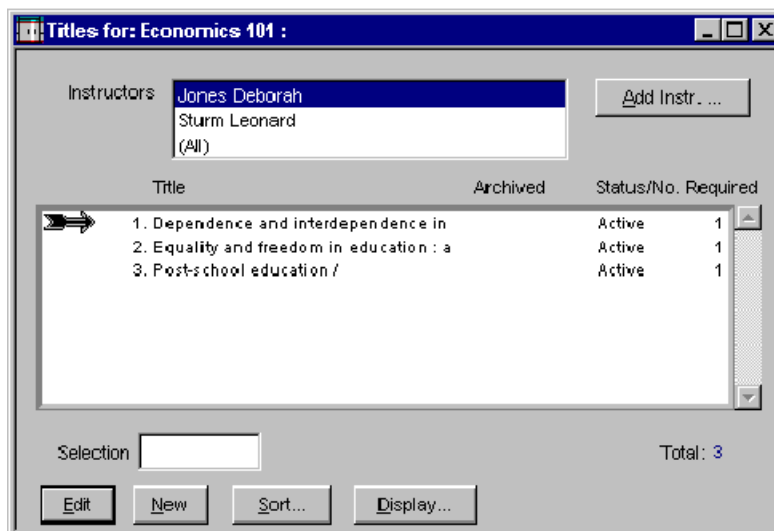
Horizon displays the List Reserve Course window.

- 2 Choose the course that you want to add the titles to.
- 3 Click **Titles**.

Horizon displays the instructors and titles for the course.

- 4 Highlight the instructor to whom you want to add titles.

Horizon displays a list of titles linked to the instructor:



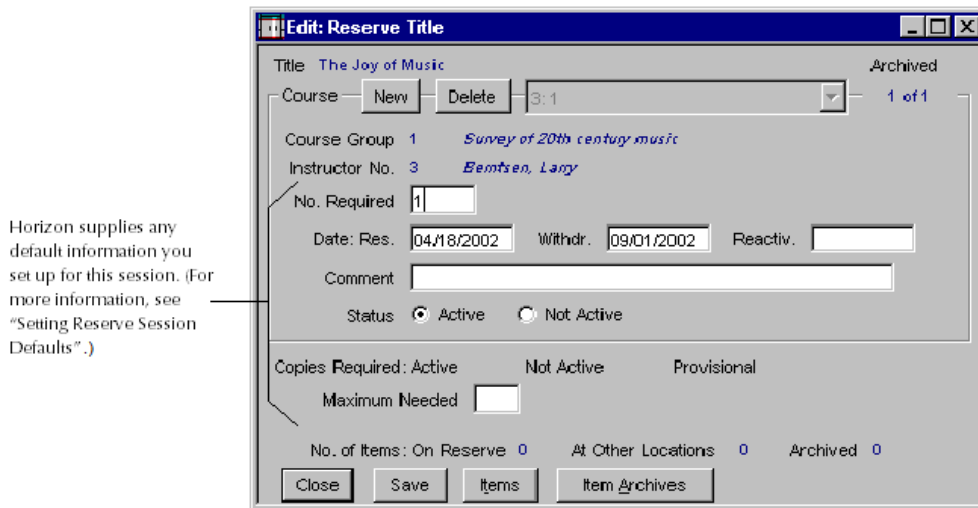
- 5 Click **New**.

Horizon displays the Identify a Title window:



- 6 Click **Search PAC**.
- 7 Search for the title you want. (For instructions, see the “Searching” chapter of the *Horizon Basics Guide*.)
- 8 Highlight the title you want.
- 9 Press **F10** or choose **Edit, Send to**.
Horizon opens the Send To dialog box.
- 10 Double-click the process to which you want to send the title.

Horizon opens the Edit Reserve Title window:



- 11 Complete or update these fields and options:

Field	Action
No. Required	Enter the number of copies of the title that you need to place on reserve.
Reserve Date	Enter the date when you want to place this title on reserve.

Field	Action
Withdrawal Date	Enter the date when you want to withdraw this title from reserve.
Reactivation Date	Enter the date when you want to place this title on reserve again.
Comment	Enter any comments (up to 255 characters) about the title. (For example, if you have several volumes for one title, enter “vol. 3”.)
Status	Do one of these options: <ul style="list-style-type: none"> • If you want to place this title on reserve, or you want users to be able to search for the title, mark Active. • If you do <i>not</i> want to place this title on reserve, or you do <i>not</i> want users to be able to search for the title when all other ICT records for the title are also inactive, mark Inactive.
Maximum Needed	Enter the maximum number of copies that you need to place on reserve.

12 Save your changes.

Horizon links the title to the instructor and course.

Placing an Item on Reserve

When you place an item on reserve, Horizon updates the item status to “checked in” in the reserve location. You can then begin circulating the item in Reserve Bookroom. At this time, you can temporarily change the item’s ITYPE, call number, and collection if necessary. When you withdraw the item from reserve, Horizon restores the owning location, ITYPE, call number, and collection on the Item record.

This section explains these topics:

- [Reserving a Single Item on page 35](#)
- [Reserving a Group of Items on page 37](#)

Reserving a Single Item

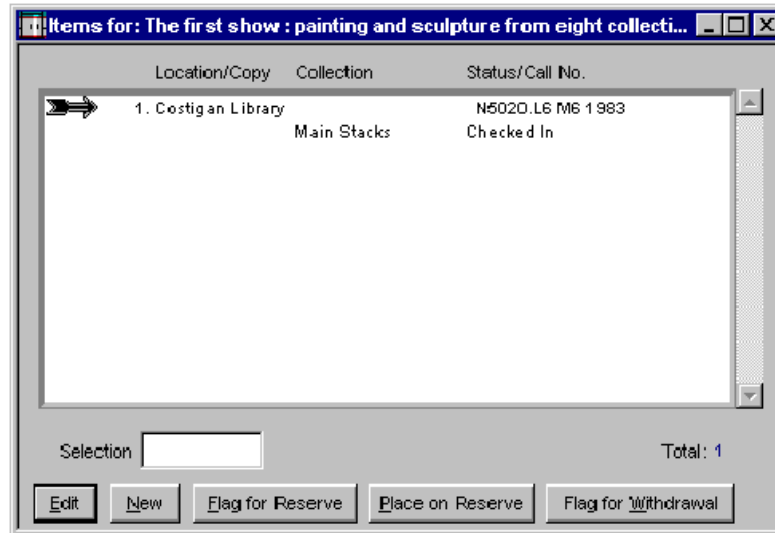
After you retrieve an item, you can place the item on reserve when you link the item’s title to a Course or Instructor record.

Before you begin, make sure there is an active Title record for the item you want to place on reserve. (For instructions on changing the status, see [Editing Reserve Information for a Title on page 43.](#))

To reserve a single item

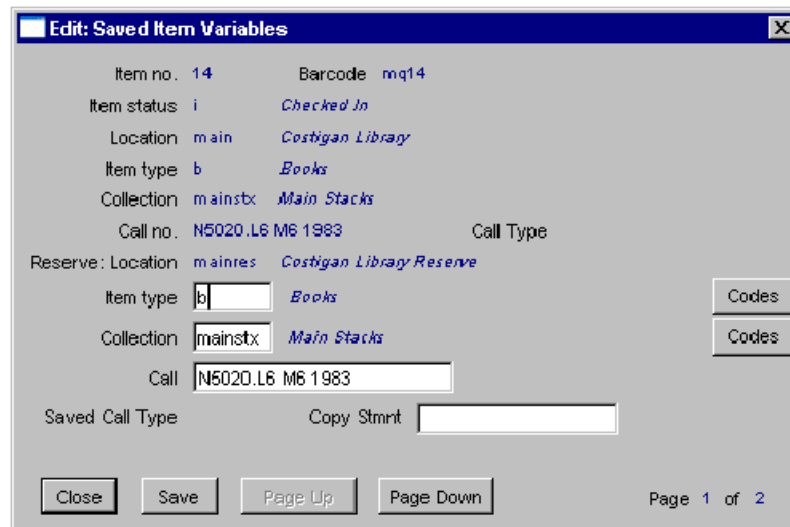
- 1 If you have not already done so, create a Title record for the item. (For instructions, see [Creating a Reserve Title Record on page 33.](#))
- 2 On the Edit Reserve Title window, click **Items**.

Horizon lists all of the copies (items) for this title:



- 3 Highlight the item that you want to place on reserve.
- 4 Click **Place on Reserve**.

Horizon displays the Edit Saved Item Variables window:



Note: If you set up session defaults, Horizon may automatically complete some fields. (For more information, see [Setting Reserve Session Defaults on page 7.](#))

- 5 Complete or update these fields:

Field	Action
Item Type	Enter the item type (ITYPE) you want to use for this item in the reserve location, or click Codes to choose from a list.
Collection	Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.
Call	Enter the call number for this item.
Copy Stmt.	Enter any comment about this copy. (For example, if this is one of three copies, enter "copy 3".)
Check In Note	Enter a note for reserve staff who check in this item.

6 Save your changes.

The item is now checked in to the reserve location and available for circulation.



Reserving a Group of Items

If you have a large number of items that you need to place on reserve, and you have already created Title records for each item, you can retrieve the items and place them on reserve at the same time.

Before you begin, make sure there is an active Title record for the item you want to place on reserve. (For instructions on changing the status, see [Editing Reserve Information for a Title on page 43.](#))

To reserve a group of items

- 1 Start the **Place Items on Reserve** process.

The default location of this process is the **Reserve Bookroom\ Reserve** folder on the navigation bar.

Horizon opens the Place Items on Reserve window:

2 Do one of these options:

- Enter the item's barcode in the **Barcode** field, then click **OK**.
- Scan the item's barcode.

Horizon displays the Edit Saved Item Variables window:

When you place a library-owned item on reserve, Horizon saves the owning location so that you can return the item after you withdraw it from reserve.

When you place a library-owned item on reserve, Horizon temporarily moves the item record to the reserve location.

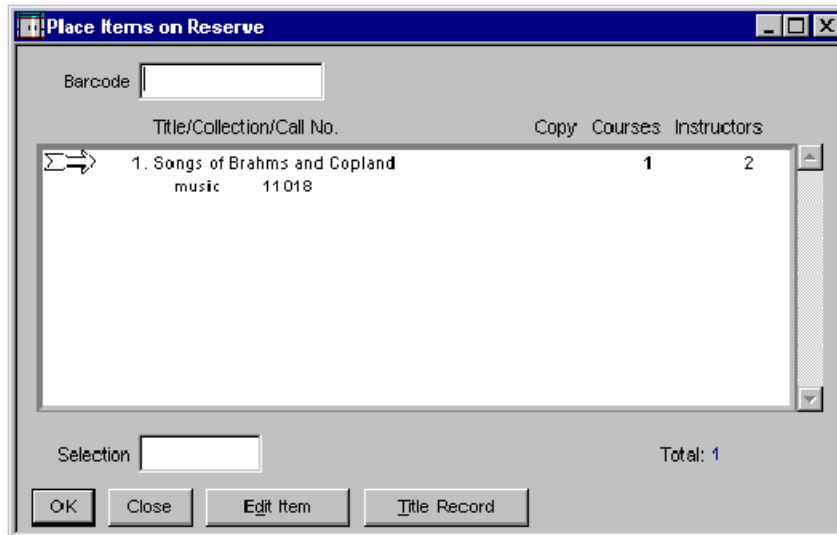
Note: If you set up session defaults, Horizon may automatically complete some fields. (For more information, see [Setting Reserve Session Defaults on page 7.](#))

3 Complete or update these fields:

Field	Action
Item Type	Enter the item type (ITYPE) you want to use for this item in the reserve location, or click Codes to choose from a list.
Collection	Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.
Call	Enter the call number for this item.
Copy Stmt.	Enter any comment about this copy. (For example, if this is one of three copies, enter “copy 3”.)
Check In Note	Enter a note for reserve staff who check in this item.

4 Save your changes.

Horizon adds the item to a list of reserve items:



5 If you want to edit the Item or Title record, do these steps:

- a Highlight the item, then click **Edit Item**.

(For instructions on editing the Item record, see [Editing the Item Record While Placing an Item on Reserve](#) on page 46.)

- b Highlight the item, then click **Title Record**.

(For instructions, on editing a reserve title, see [Using a Pick List Report](#) on page 42.)

Important: At this point, you should review the Title record to verify that the withdraw cataloging action for any library-owned title is not set to “Discard Item” or “Discard Item and Bib.” (For more information, see [Choosing a Withdrawal Cataloging Action](#) on page 78.)

6 Repeat steps 2 through 5 for each item that you want to place on reserve.

- 7 Click **Close**.

Flagging Items for Reserve

When you place items on reserve, you must retrieve the items from the owning location and store them at the reserve location. If your library owns these items and they are normally located in the library's main stacks, you can flag the item record for these items to indicate they need to be placed on reserve. If an item is currently checked out, Horizon alerts staff members when the item is returned that it needs to be placed on reserve. (You can customize the text of this message. For instructions, see [Setting Up a Reserve Location Record on page 13.](#))

When you flag an item for reserve, Horizon changes the item's status to "rb" (reserve bookroom) and adds the item to a Pick List. You can then print the Pick List to use as a reference to retrieve the items. (For instructions, see [Using a Pick List Report on page 42.](#))

Before you begin, make sure the Title record for the item you want to place on reserve has an "Active" status; otherwise, you cannot search for the item in reserve. (For instructions on changing the status, see [Editing Reserve Information for a Title on page 43.](#))

To flag items for reserve

- 1 Search for the instructor or course linked to the title that you want to reserve.
- 2 Highlight the course or instructor with the title you want.
- 3 Click **Edit**.

Horizon displays the Edit Reserve Title window.

- 4 Click **Items**.

Horizon lists all of the copies (items) for this title:

This item is currently checked in at the main location and stored in the main stacks.

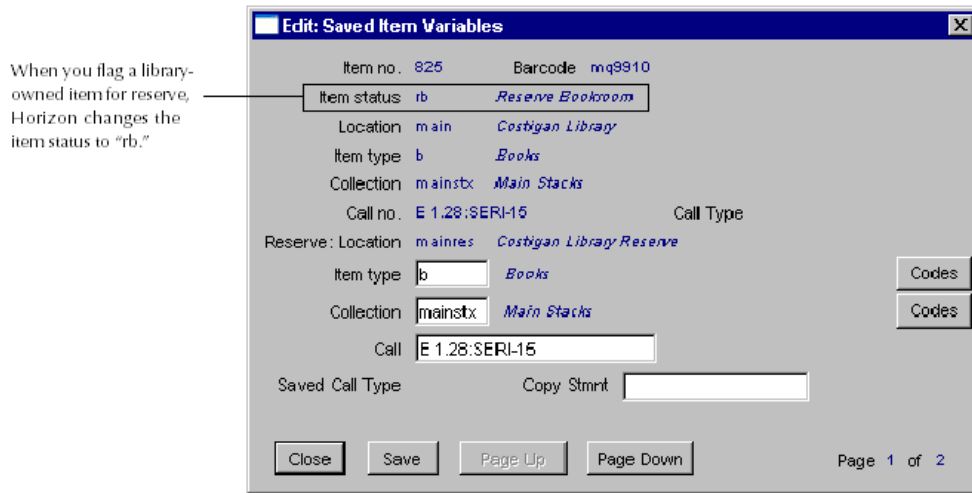
Location/Copy	Collection	Status/Call No.
1. Costigan Library	Main Stacks	Checked In E 1.28:SERI-15
2. Costigan Library	Main Stacks	Checked In KQP0 .H36 1985

Selection Total: 2

- 5 Highlight the item that you want to flag for reserve.

6 Click Flag for Reserve.

Horizon opens the Edit Saved Item Variables window:



Note: If you set up session defaults, Horizon may automatically complete some fields. (For more information, see [Setting Reserve Session Defaults](#) on page 7.)

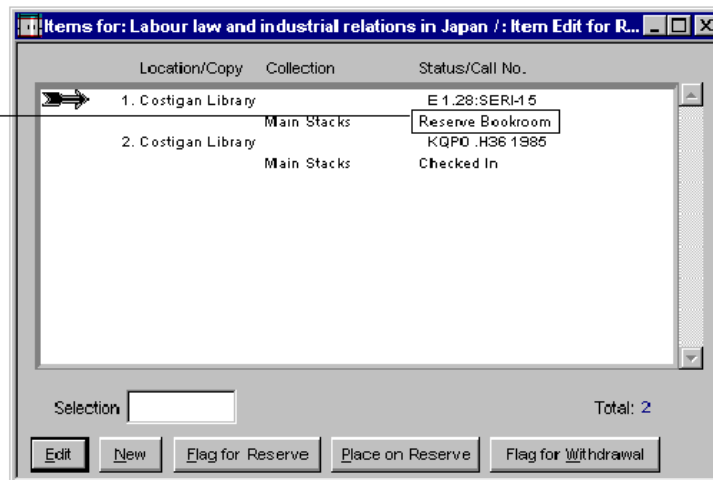
7 Complete or update these fields:

Field	Action
Item Type	Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click Codes to choose from a list.
Collection	Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.
Call	Enter the call number for this item.
Copy Stmt.	Enter any comment about this copy. (For example, if this is one of three copies, enter “copy 3”.)
Check In Note	Enter a note for reserve staff who check in this item.

8 Save your changes.

Horizon changes the item status to Reserve Bookroom:

The item status indicates this item is flagged for reserve, even though it is still located in the main library.



- When the item becomes available, place it on reserve. (For instructions, see [Placing an Item on Reserve on page 35.](#))

Using a Pick List Report

After you flag an item for reserve, you can generate and print a Pick List report. This report lists all of the items that you need to retrieve from other locations, such as the owning location, and place on reserve. You can choose the location for which you want to generate the Pick List. After you retrieve the items, you can use a Pick List to place the items on reserve.

You can generate these types of Pick Lists:

- **Prepare and Show.** Lets you generate a list of items that are checked in to another location and that you need to retrieve and place on reserve. Horizon flags each item for reserve and changes the item status to “rb” (reserve bookroom).
- **Show.** Lets you generate a list of items from a previous Pick List, that have not yet been placed on reserve. This type of Pick List is useful when a Pick List has been prepared, but not yet printed.
- **Cumulative.** Lets you generate a list of items with a reserve bookroom (rb) status at another location.

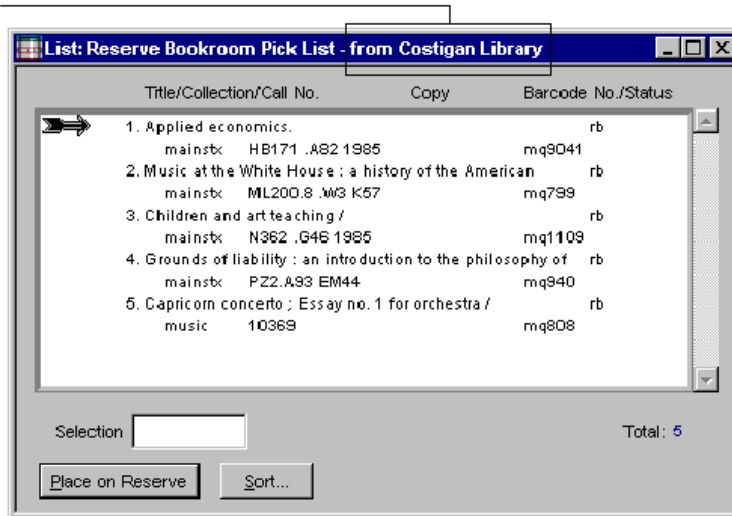
To use a Pick List report

- Start one of these Pick List processes:
 - Pick List: Prepare and Show
 - Pick List: Show
 - Pick List: Cumulative

The default location of these processes is the **Reserve Bookroom\Reports** folder on the navigation bar.

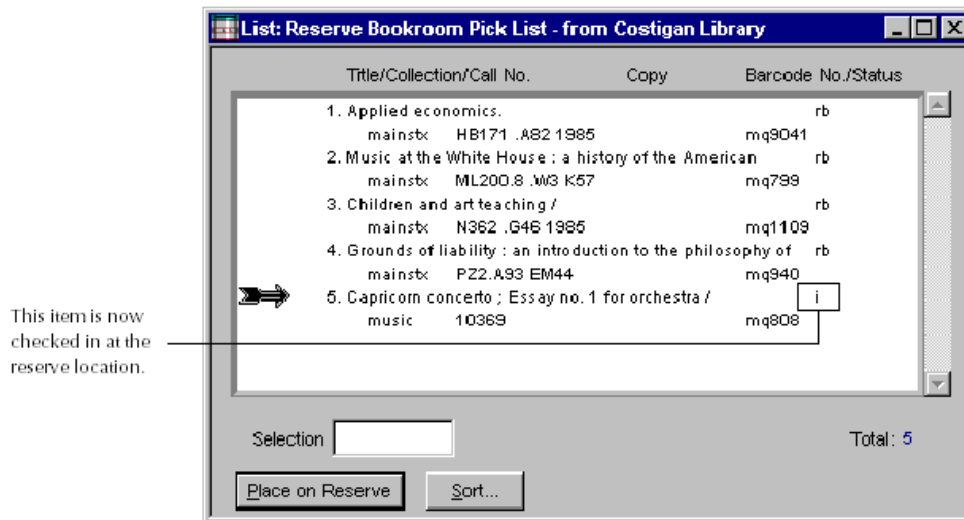
Horizon displays the List Reserve Bookroom Pick List window:

The Pick List lists the items that you need to place on reserve from the location you choose.



- 2 If you want to print the list, choose **File, Print**.
- 3 If you want to place an item on reserve, highlight the item, then click **Place on Reserve**.

Horizon changes the item status and places the item on reserve:



- 4 Close the List Reserve Bookroom Pick List window.

Editing Reserve Information for a Title

After you link a title to an instructor, or place an item on reserve, you can edit the reserve information for the title. You can do this at any time as changes become necessary. (For example, you may need to postpone the date when you want to place an item on reserve, or cancel the reactivation date.)

To edit reserve information for a title

- 1 Search for the instructor linked to the title that you want to edit.

Note: You can also edit reserve information for titles by first searching for a course, then choosing the instructor linked to the title you want to edit.

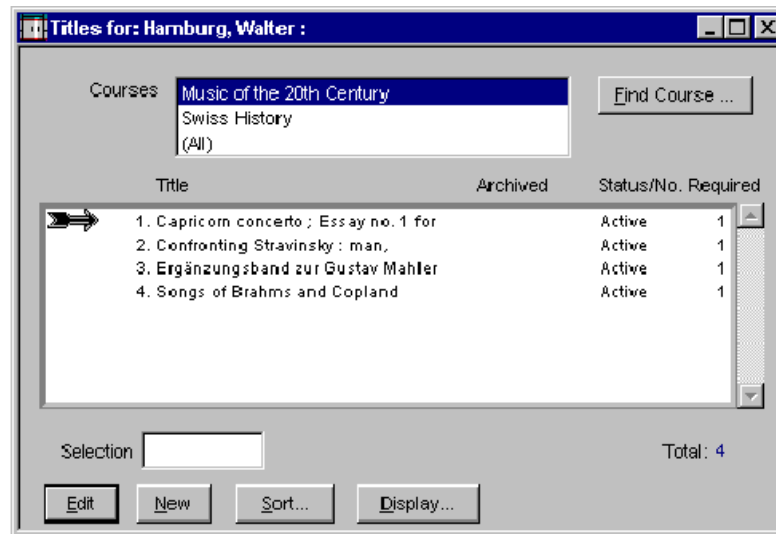
Horizon displays the List Reserve Instructor window.

- 2 Choose the instructor linked to the title that you want to edit.
- 3 Click **Titles**.

Horizon displays the courses and titles for the instructor.

- 4 Highlight the course linked to the title that you want to edit.

Horizon displays a list of titles linked to the course:



- 5 Highlight the title you want to edit.
- 6 Click **Edit**.

Horizon displays the Edit Reserve Title window:

7 Complete or update these fields and options:

Field	Action
No. Required	Enter the number of copies of the title that you need to place on reserve.
Reserve Date	Enter the date when you want to place this title on reserve.
Withdrawal Date	Enter the date when you want to withdraw this title from reserve.
Reactivation Date	Enter the date when you want to place this title on reserve again.
Comment	Enter any comments (up to 255 characters) about the title.
Status	Do one of these options: <ul style="list-style-type: none"> • If you want to place this title on reserve, or you want users to be able to search for the title, mark Active. • If you do <i>not</i> want to place this title on reserve, or you do <i>not</i> want users to be able to search for the title when all other ICT records for the title are also inactive, mark Inactive.
Maximum needed	Enter the maximum number of copies that you need to place on reserve.

8 Save your changes.

Horizon displays the Titles for *Instructor* window.

9 Repeat steps 5 through 8 for each title that you want to edit.

Changing Reserve Item Records

You can edit Item records for items after you place them on reserve or at the same time you place them on reserve. (An Item record represents a specific copy of a title.) When you place an item from your library catalog on reserve, you create a Reserve record for the item. After you place the item on reserve, you can edit information about the item. (For example, if you have more than one reserve location, you may need to change the reserve location.) This is also important if you need to change the item type (ITYPE) in order to change the loan period or other circulation privileges. (For example, you may let borrowers check out a book for two months from the main location, but for only one week or five hours from the reserve location.) You can also assign an owner to an item. (An owner is any individual or institution that owns an item.)

This section explains these topics:

- [Editing the Item Record While Placing an Item on Reserve](#) on page 46
- [Editing the Item Record After Placing an Item on Reserve](#) on page 49
- [Assigning an Owner to a Reserve Item](#) on page 52

Editing the Item Record While Placing an Item on Reserve

If you need to, you can change information in the item record for an item that you are in the process of placing on reserve. (For example, you may need to give the item a temporary barcode while it is in the reserve location, or you may need to change the withdrawal instructions.)

To edit the Item record while placing an item on reserve

- 1 Place the item on reserve. (For instructions, see [Placing an Item on Reserve](#) on page 35.)
- 2 At the Place Items on Reserve window, click **Edit Item**.

Horizon displays the Edit Place Items on Reserve window:

3 Complete or update these fields:

Field	Action
Item Barcode	Enter or edit the barcode of the item.
Item Type	Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click Codes to choose from a list.
Collection	Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.
Call No.	Enter the call number for this item.
Call Type	Enter the type or call number for this item, or click Codes to choose from a list. (For example, the item may have a Dewey call number.)
Copy Stmt.	Enter any comment about this copy. (For example, if this is one of three copies, enter "copy 3".)
Notes	Enter any notes about the item.

4 Click **Page Down** or resize the window to display these fields:

5 Complete or update these fields and options:

Field	Action
On Withdr	<p>Choose one of these options:</p> <ul style="list-style-type: none"> • None. If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option. • Discard Item. If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Discard Item and Bib. If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Archive Item. If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option. • Archive Item and Bib. If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option. <p>If more than one item is linked to the title, you cannot archive the Title record.</p> <p>Important: If you are working with library-owned items, do not mark the “Discard Item” or “Discard Item and Bib” options; otherwise, when you withdraw library-owned items, Horizon deletes the Item or Title records from your system. (For more information, see Choosing a Withdrawal Cataloging Action on page 78.)</p>

Field	Action
Withdr Instr	Click Codes and choose the withdrawal instruction that you want to use for these items, or to create new instructions. (For more information, see Setting Up Withdrawal Instructions on page 72.)
Check In Note	Enter a note for reserve staff who check in this item.

- 6 Save your changes.

Editing the Item Record After Placing an Item on Reserve

If necessary, you can change information in the item record for an item that you have already placed on reserve. (For example, you may need to give the item a temporary barcode while it is in the reserve location, or you may need to change the withdrawal instructions.)

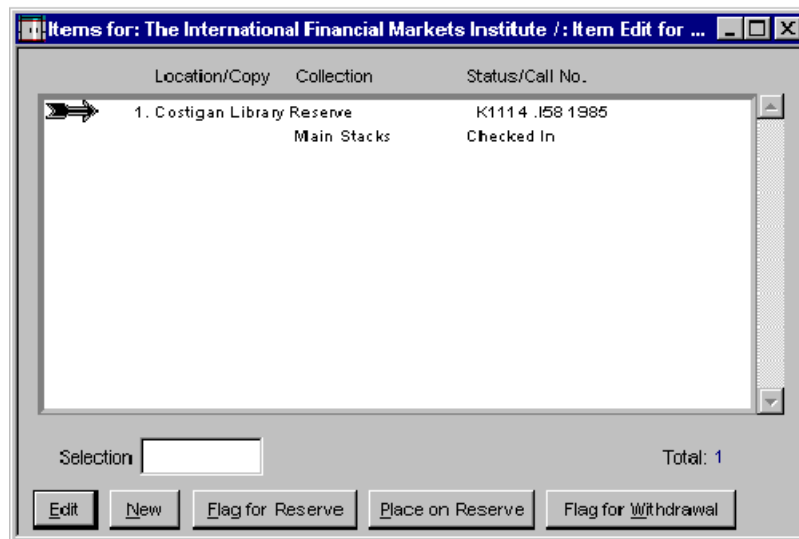
To edit the Item record after placing an item on reserve

- 1 Search for the instructor or course linked to the titles that you want to change.
- 2 Highlight the course or instructor linked to the title that you want.
- 3 Highlight the title that you want.
- 4 Click **Edit**.

Horizon displays the Edit Reserve Title window.

- 5 Click **Items**.

Horizon lists all of the copies (items) for this title:



- 6 Highlight the item that you want to edit.

Important: Make sure that the item you choose is located in the reserve library; otherwise, you may inadvertently edit an item that belongs to another location.

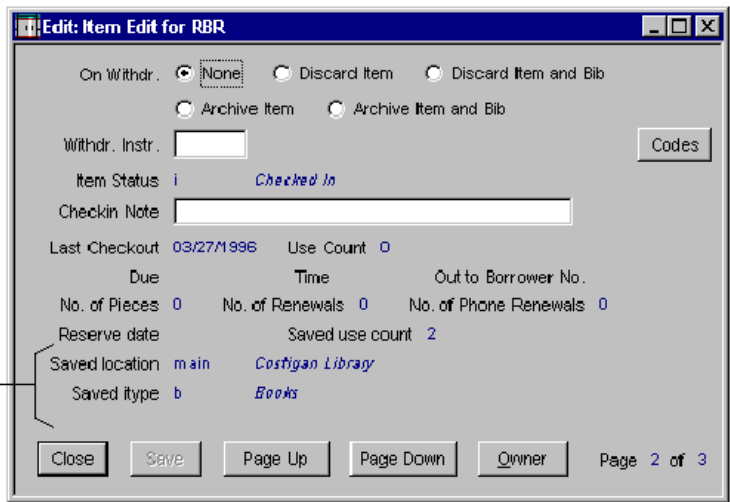
7 Click **Edit**.

Horizon displays the Edit Item Edit for RBR window:

8 Complete or update these fields:

Field	Action
Item Barcode	Enter or edit the barcode of the item.
Location	Enter the reserve location for this item, or click Codes to choose from a list. Note: If you placed the item on reserve, changing the reserve location does not change the owning location for an item. Horizon saves the owning location so that you can return the item when you withdraw it from reserve.
Item Type	Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click Codes to choose from a list.
Collection	Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.
Call No.	Enter the call number for this item.
Copy Stmt.	Enter any comment about this item. (For example, if this is one of three copies, enter "copy 3".)
Notes	Enter any notes about the item.

9 Click **Page Down** or resize the window to display these fields:



Horizon saves the owning location, ITYPE, collection, and call number so that you can return the item after you withdraw it from reserve.

10 Complete or update these fields and options:

Field	Action
On Withdr	<p>Choose one of these options:</p> <ul style="list-style-type: none"> • None. If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option. • Discard Item. If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Discard Item and Bib. If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Archive Item. If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option. • Archive Item and Bib. If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option. <p>If more than one item is linked to the title, you cannot archive the Title record.</p> <p>Note: If you are working with library-owned items, do <i>not</i> mark the “Discard Item” or “Discard Item and Bib” options; otherwise, when you withdraw library-owned items, Horizon deletes the Item or Title records from your system. (For more information, see Choosing a Withdrawal Cataloging Action on page 78.)</p>

Field	Action
Withdr Instr	Click Codes and choose the withdrawal instruction that you want to use for these items, or to create new instructions. (For more information, see Setting Up Withdrawal Instructions on page 72.)
Check In Note	Enter a note for reserve staff who check in this item.

11 Click **Page Down** or resize the window to display these fields:

12 In the **Call Type** field, enter the type or call number for this item, or click **Codes** to choose from a list. (For example, the item may have a Dewey call number.)

13 Save your changes.

Assigning an Owner to a Reserve Item

If you want to, you can assign an owner to a reserve item. (An owner is any individual or institution that owns an item.) You can choose an owner from the list of instructors, or you can create a new owner.

Assigning an owner to a reserve item may be helpful if the owner of an item is different than the instructor who wants to reserve the item. It may also be helpful if you have a generic instructor, such as “English Department”, and the item belongs to an individual faculty member (for example, “Dr. Peer”).

In addition to the withdrawal instructions, an owner can indicate to reserve staff members what to do with an item after withdrawing it. (For example, the withdrawal instructions may be “Return Item to Owner” or “Inform owner item is no longer on reserve.”)

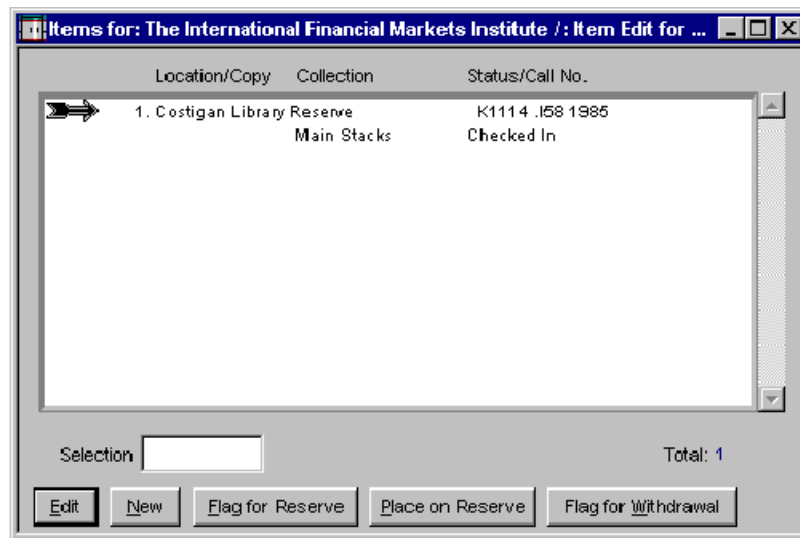
To assign an owner to a reserve item

- 1 Search for the instructor or course linked to the titles that you want to change.
- 2 Highlight the course or instructor linked to the title that want.
- 3 Highlight the title that you want.
- 4 Click **Edit**.

Horizon displays the Edit Reserve Title window.

- 5 Click **Items**.

Horizon lists all of the copies (items) for this title:



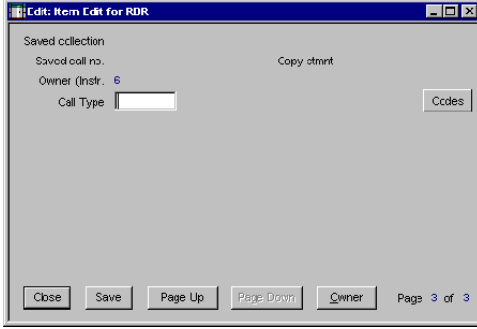
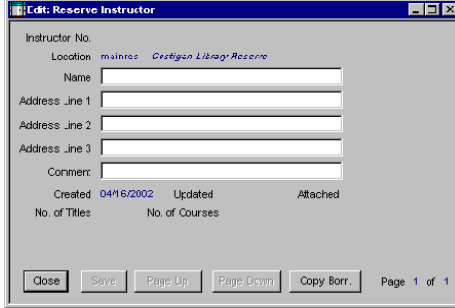
- 6 Highlight the item to which you want to assign an owner.
- 7 Click **Edit**.

Horizon displays the Edit Item Edit for RBR window:

8 Click Owner.

Horizon displays the List Reserve Instructor window.

9 Do one of these options:

Choose an owner from the list of instructors	Create a new owner
<p>1. Highlight the instructor you want.</p> <p>2. Click Found.</p> <p>Horizon displays the Owner Instr field on the Edit Item Edit for RBR window:</p>  <p>3. Save your changes.</p>	<p>1. Click New.</p> <p>Horizon displays the Edit Reserve Instructor window:</p>  <p>2. Complete the fields. (For instructions, see Setting Up or Changing an Instructor Record on page 22.)</p> <p>3. Save your changes.</p>

Chapter 5: Reserving Other Items

This chapter explains how to prepare items that your library does not own for reserve (for example, an instructor's personal copy). It also explains how to place the items on reserve.

This chapter contains these sections:

- [About Reserving Other Items](#) on page 55
- [Creating a Reserve Title Record](#) on page 55
- [Placing an Item on Reserve](#) on page 58
- [Editing Reserve Information for a Title](#) on page 62
- [Changing Reserve Item Records](#) on page 65

About Reserving Other Items

After you create an Instructor and Course record, you can place items on reserve for an instructor, even if your library does not own the items. (For example, the instructor may want to make a copy of a test available to students on a certain day.) After you receive the item from the instructor, you can create a Short Bib record for the item as well as an Item record. You can then place the item on reserve.

Once you place an item on reserve, you can circulate reserve items according to the circulation parameters you set up for your reserve location and the ITYPE of reserve items. (For more information, see [Defining Reserve Circulation Privileges](#) on page 15.)



Remember that you must do all reserve tasks in the reserve location. (For instructions on switching to a reserve location, see [Switching to a Reserve Location](#) on page 6.)

Creating a Reserve Title Record

Before you can reserve an item for an instructor, you need to link the title of the item to a course that the instructor teaches. You can create a Short Bib record for any title that your library does not own. (For example, an instructor may want you to place on reserve a personal copy of *A Tale of Two Cities*.) Horizon creates an Instructor/Course/Title (ICT) record that links the instructor, course, and title together. Users can then search for the items by instructor, course, or title.

To create a reserve Title record

- 1 Search for the instructor to whom you want to link a title.

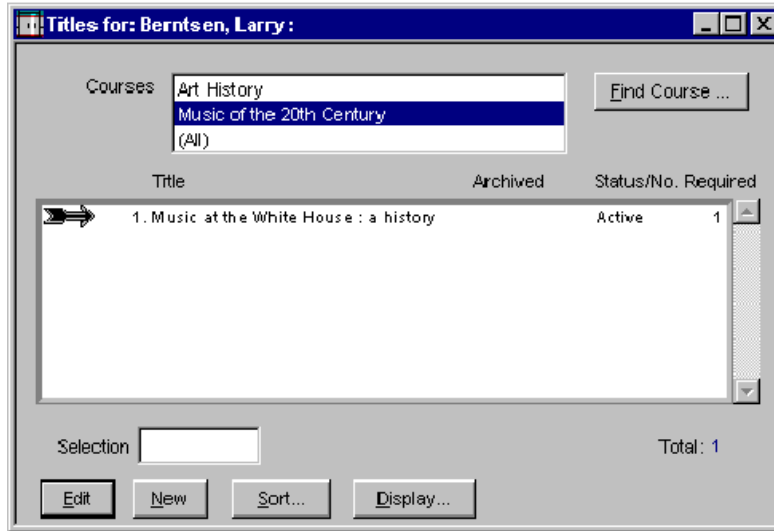
Note: You can also create a reserve Title record by first searching for the course and then choosing the instructor to whom you want to add.

- 2 Choose the instructor to whom you want to add the title.
- 3 Click **Titles**.

Horizon displays the courses and titles for the instructor.

- 4 Highlight the course that you want to add the title to.

Horizon displays a list of titles linked to the instructor:



- 5 Click **New**.

Horizon displays the Identify a Title window:



- 6 Click **Create Short Bib**.

Horizon displays the Edit Short Bib window:

7 Complete these fields:

Field	Action
Author	Enter the author of this title.
ISBN	Enter the ISBN of this title.
ISSN	Enter the ISSN of this title.
Title	Enter the title.

Note: In order to edit the title, author, ISBN, ISSN, and other title information after you place an item on reserve, you must have cataloging privileges. (For more information about setting up these privileges, see “Securing Horizon” in the “Security and Preferences” chapter of the *System Administration Guide*.)

8 Click **OK**.

Horizon opens the Edit Reserve Title window:

9 Complete or update these fields and options:

Field	Action
No. Required	Enter the number of copies of the title that you need to place on reserve.
Reserve Date	Enter the date when you want to place this title on reserve.
Withdrawal Date	Enter the date when you want to withdraw this title from reserve.
Reactivation Date	Enter the date when you want to place this title on reserve again.
Comment	Enter any comments (up to 255 characters) about the title. (For example, if you have several volumes for one title, enter "vol. 3".)
Status	Do one of these options: <ul style="list-style-type: none"> • If you want to place this title on reserve, or you want users to be able to search for the title, mark Active. • If you do <i>not</i> want to place this title on reserve, or you do <i>not</i> want users to be able to search for the title when all other ICT records for the title are also inactive, mark Inactive.
Maximum Needed	Enter the maximum number of copies (items) that you need to place on reserve.

10 Save your changes.

Horizon links the title to the instructor and course.

Placing an Item on Reserve

You need to create an Item record for non library-owned items that you want to place on reserve. (For example, you may need to create an Item record for an instructor's personal copy of *A Tale of Two Cities*.) The Item record includes a barcode and other identifying information that lets you circulate the item in Reserve Bookroom. When you create an Item record in the reserve location, Horizon automatically places the item on reserve.

Before you begin, make sure there is an active Title record for the item you want to place on reserve. (For instructions on changing the status, see [Editing Reserve Information for a Title](#) on page 62.)

To place an item on reserve

- 1 If you have not already done so, create a reserve Title record for the item. (For instructions, see [Creating a Reserve Title Record](#) on page 55.)

Horizon displays the Edit Reserve Title window:

2 Click **Items**.

There are currently no items for this title:

3 Click **New**.

Horizon displays the Edit Item Edit for RBR window:

Note: If you set up session defaults, Horizon may automatically complete some fields. (For more information, see [Setting Reserve Session Defaults](#) on page 7.)

4 Complete these fields:

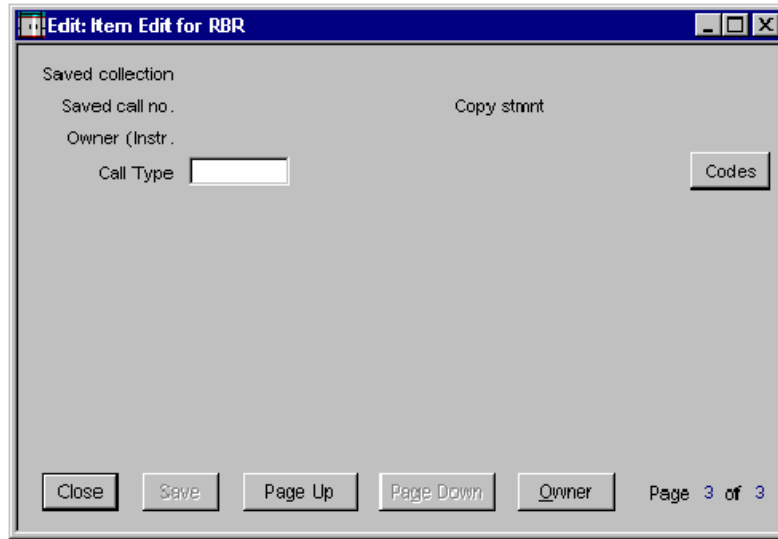
Field	Action
Item Barcode	Enter or scan the barcode of the item.
Location	Enter the reserve location for this item, or click Codes to choose from a list.
Item Type	Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click Codes to choose from a list.
Collection	Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.
Call No.	Enter the call number for this item.
Copy Stmt.	Enter any comment about this copy. (For example, enter "Copy 3".)
Notes	Enter any notes about the item.

5 Click **Page Down** or resize the window to display these fields:

6 Complete these fields and options:

Field	Action
On Withdr	<p>Choose one of these options:</p> <ul style="list-style-type: none"> • None. If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option. • Discard Item. If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Discard Item and Bib. If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Archive Item. If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option. • Archive Item and Bib. If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option. (If more than one item is linked to the title, you cannot archive the Title record.) <p>For more information, see Choosing a Withdrawal Cataloging Action on page 78.</p>
Withdr Instr	<p>Click Codes and choose the withdrawal instruction that you want to use for these items, or to create new instructions.</p> <p>For more information, see Setting Up Withdrawal Instructions on page 72.</p>
Check In Note	Enter a note for reserve staff who check in this item.

- 7 Click **Page Down** or resize the window to display these fields:



- 8 In the **Call Type** field, enter the type or call number for this item, or click **Codes** to choose from a list. (For example, the item may have a Dewey call number.)
- 9 Save your changes.
Horizon places the item on reserve.
- 10 If you need to place on reserve several copies of the same title, do these steps:
 - a From the Items For *Title* window, highlight the Item record that you want to copy.
 - b Choose **File, Copy Record**.
Horizon creates a new Item record.
 - c If necessary, change any fields. (For example, you can change the item barcode or copy statement.)
 - d Save your changes.
Horizon places the item on reserve.

Editing Reserve Information for a Title

After you link a title to an instructor, or place an item on reserve, you can edit the reserve information for this title. You can do this at any time as changes become necessary. (For example, you may need to postpone the date when you want to place an item on reserve, or cancel the reactivation date.)



In order to edit the title, author, ISBN, ISSN, and other title information, you must have cataloging privileges. (For more information about setting up these privileges, see “Securing Horizon” in the “Security and Preferences” chapter of the *System Administration Guide*.)

To edit reserve information for a title

- 1 Search for the instructor linked to the title that you want to edit.

Note: You can also edit reserve information for titles by first searching for a course, then choosing the instructor linked to the title that you want to edit.

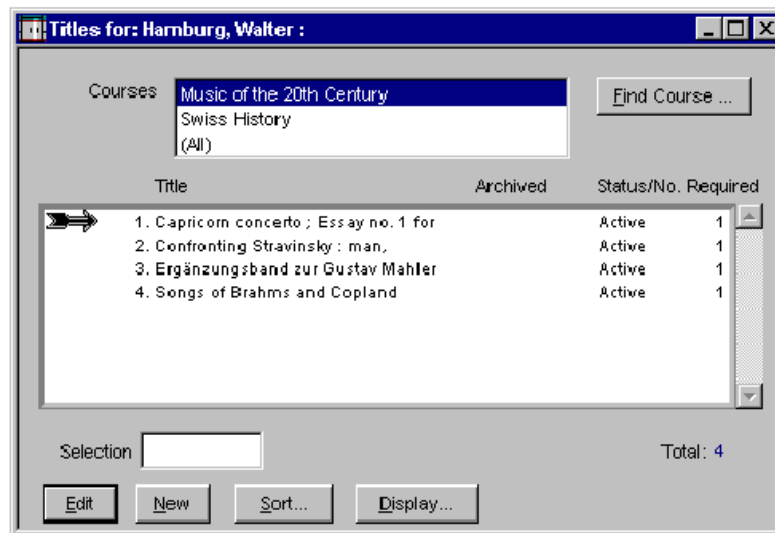
Horizon displays the List Reserve Instructor window.

- 2 Choose the instructor linked to the title that you want to edit.
- 3 Click **Titles**.

Horizon displays the courses and titles for the instructor.

- 4 Highlight the course linked to the title that you want to edit.

Horizon displays a list of titles linked to the course:



- 5 Highlight the title that you want.
- 6 Click **Edit**.

Horizon displays the Edit Reserve Title window:

7 Complete or update these fields and options:

Field	Action
No. Required	Enter the number of copies of the title that you need to place on reserve.
Reserve Date	Enter the date when you want to place this title on reserve.
Withdrawal Date	Enter the date when you want to withdraw this title from reserve.
Reactivation Date	Enter the date when you want to place this title on reserve again.
Comment	Enter any comments (up to 255 characters) about the title.
Status	<p>Do one of these options:</p> <ul style="list-style-type: none"> • If you want to place this title on reserve, or you want users to be able to search for the title, mark Active. • If you do <i>not</i> want to place this title on reserve, or you do <i>not</i> want users to be able to search for the title when all other ICT records for the title are also inactive, mark Inactive.
Maximum needed	Enter the maximum number of copies (items) that you need to place on reserve.

8 Save your changes.

Horizon displays the Titles for *Instructor* window.

9 Repeat steps 5 through 8 for each title that you want to edit.

Changing Reserve Item Records

You can edit Item records for items after you place them on reserve. (An Item record represents a specific copy of a title.) When you place an item on reserve, you create a reserve record for the item. You can edit information about the item. (For example, if you have more than one reserve location, you may need to change the reserve location.) This is also important if you need to change the item type (ITYPE) in order to change the loan period or other circulation privileges. You can also assign an owner to an item. (An owner is any individual or institution that owns an item.)

This section explains these topics:

- [Editing the Item Record after Placing an Item on Reserve on page 65](#)
- [Assigning an Owner to a Reserve Item on page 69](#)

Editing the Item Record after Placing an Item on Reserve

If necessary, you can change information in the item record for an item that you have already placed on reserve. (For example, you may need to give the item a temporary barcode while it is in the reserve location, or you may need to change the withdrawal instructions.)

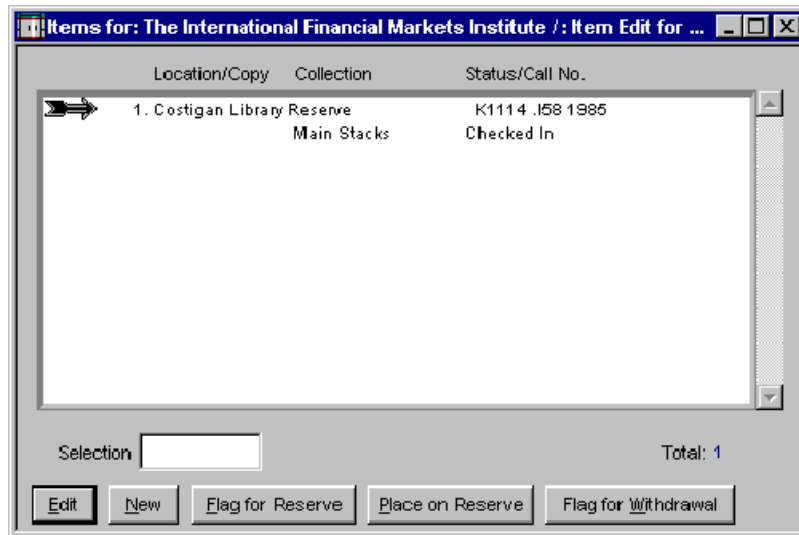
To edit the Item record for a reserve item

- 1 Search for the instructor or course linked to the titles that you want to change.
- 2 Highlight the course or instructor linked to the title that you want.
- 3 Highlight the title that you want.
- 4 Click **Edit**.

Horizon displays the Edit Reserve Title window.

- 5 Click **Items**.

Horizon lists all of the copies (items) for this title:

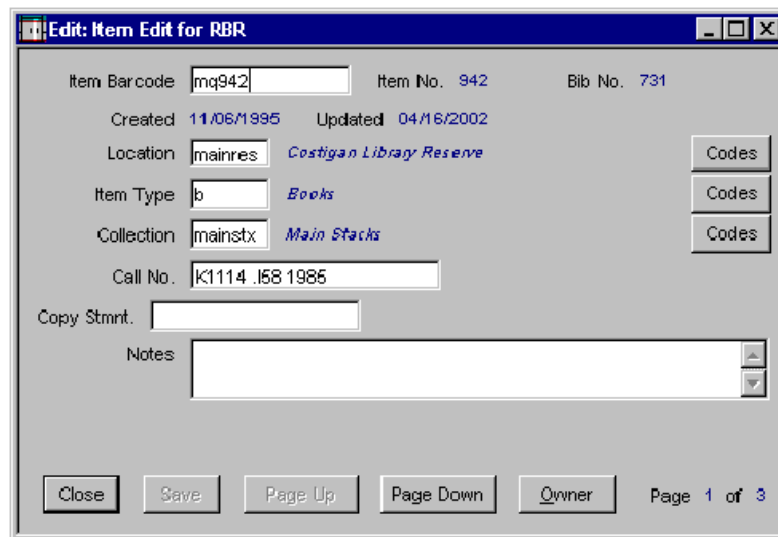


- 6 Highlight the item that you want to edit.

Important: Make sure the item that you highlight is located in the reserve library; otherwise, you may inadvertently edit an item that belongs to another location.

- 7 Click **Edit**.

Horizon displays the Edit Item Edit for RBR window:



- 8 Complete or update these fields:

Field	Action
Item Barcode	Enter or edit the barcode of the item.

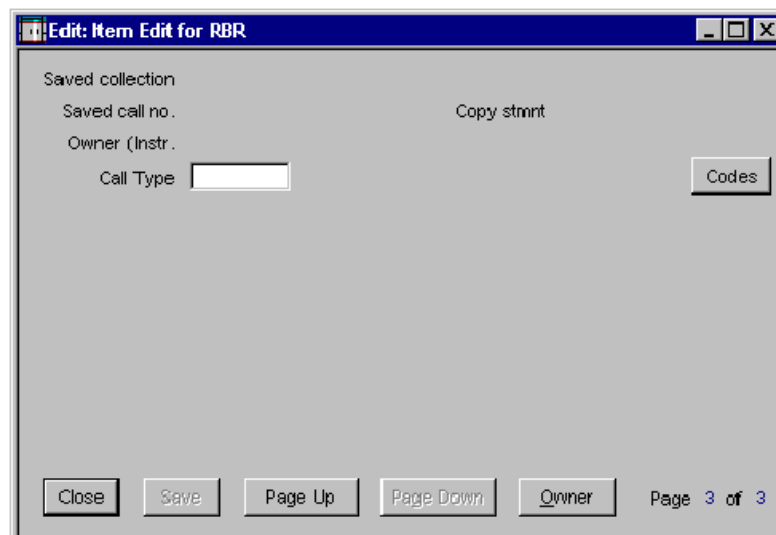
Field	Action
Location	Enter the reserve location for this item, or click Codes to choose from a list. Note: Changing the reserve location does not change the owning location for an item. Horizon saves the owning location so that you can return the item when you withdraw it from reserve.
Item Type	Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click Codes to choose from a list.
Collection	Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.
Call No.	Enter the call number for this item.
Copy Stmt.	Enter any comment about this item. (For example, if this is one of three copies, enter "copy 3".)
Notes	Enter any notes about the item.

9 Click **Page Down** or resize the window to display these fields:

10 Complete or update these fields and options:

Field	Action
On Withdr	<p>Choose one of these options:</p> <ul style="list-style-type: none"> • None. If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option. • Discard Item. If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Discard Item and Bib. If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option. • Archive Item. If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option. • Archive Item and Bib. If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option. (If more than one item is linked to the title, you cannot archive the Title record.) <p>For more information, see Choosing a Withdrawal Cataloging Action on page 78.</p>
Withdr Instr	<p>Click Codes and choose the withdrawal instruction that you want to use for these items, or to create new instructions.</p> <p>For more information, see Setting Up Withdrawal Instructions on page 72.</p>
Check In Note	Enter a note for reserve staff who check in this item.

11 Click **Page Down** or resize the window to display these fields:



- 12 In the **Call Type** field, enter the type or call number for this item, or click **Codes** to choose from a list. (For example, the item may have a Dewey call number.)
- 13 Save your changes.

Assigning an Owner to a Reserve Item

If you want to, you can assign an owner to a reserve item. (An owner is any individual or institution that owns an item.) You can choose an owner from the list of instructors, or you can create a new owner.

Assigning an owner to a reserve item may be helpful if the owner of an item is different than the instructor who wants to reserve the item. It may also be helpful if you have a generic instructor, such as “English Department”, and the item belongs to an individual faculty member (for example, “Dr. Peer”).

In addition to the withdrawal instructions, an owner can indicate to reserve staff members what to do with an item after withdrawing it. (For example, the withdrawal instructions may be “Return Item to Owner,” or “Inform owner item is no longer on reserve.”)

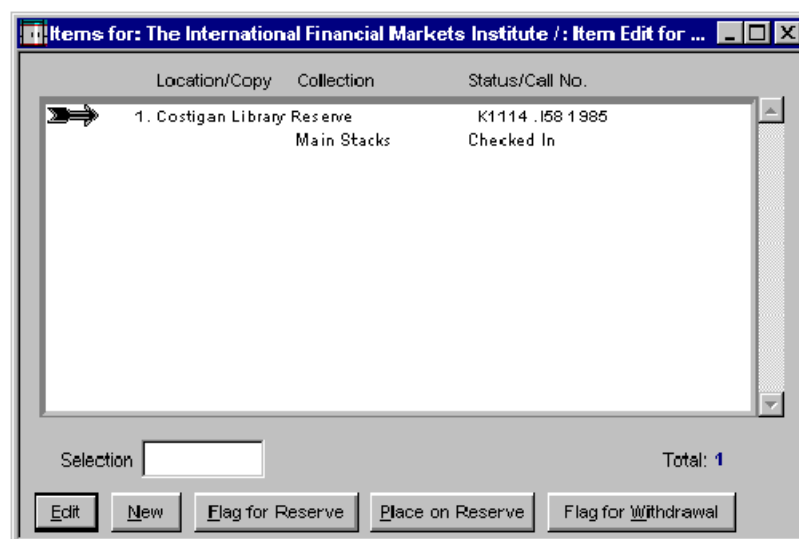
To assign an owner to a reserve item

- 1 Search for the instructor or course linked to the titles that you want to change.
- 2 Highlight the course or instructor linked to the title that you want.
- 3 Highlight the title that you want.
- 4 Click **Edit**.

Horizon displays the Edit Reserve Title window.

- 5 Click **Items**.

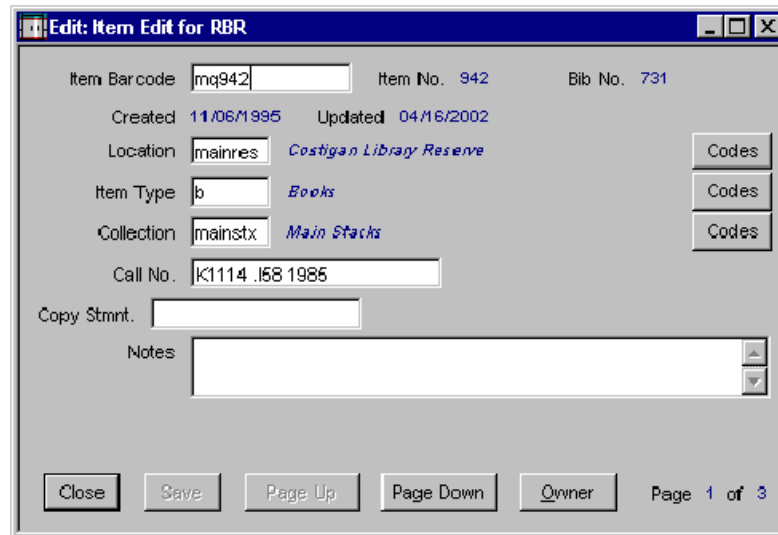
Horizon lists all of the copies (items) for this title:



- 6 Highlight the item to which you want to assign an owner.

7 Click **Edit**.

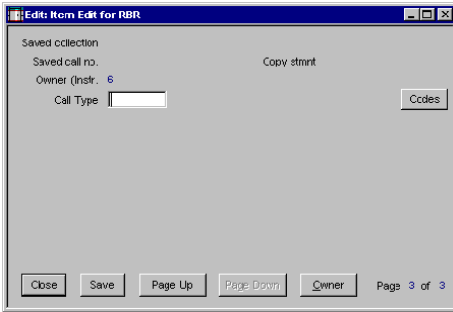
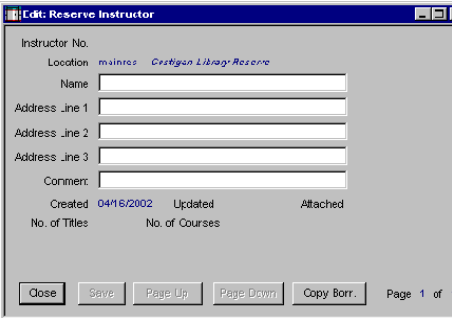
Horizon displays the Edit Item Edit for RBR window:



8 Click **Owner**.

Horizon displays the List Reserve Instructor window.

9 Do one of these options:

<p>Choose an owner from the list of instructors</p>	<p>Create a new owner</p>
<p>1. Highlight the instructor that you want. 2. Click Found.</p> <p>Horizon displays the Owner Instr field on the Edit Item Edit for RBR window:</p>  <p>3. Save your changes.</p>	<p>1. Click New.</p> <p>Horizon displays the Edit Reserve Instructor window:</p>  <p>2. Complete the fields. (For instructions, see Setting Up or Changing an Instructor Record on page 22.)</p> <p>3. Save your changes.</p>

Chapter 6: Withdrawing Items from Reserve

This chapter explains how to prepare library-owned items and other items for withdrawal from Reserve Bookroom. It also explains how to withdraw these items and store Title and Item records in Reserve Bookroom after you withdraw them.

This chapter contains these sections:

- [About Withdrawing Items from Reserve](#) on page 71
- [Setting Up Withdrawal Instructions](#) on page 72
- [Printing Instructor Letters](#) on page 74
- [Inactivating a Reserve Title](#) on page 77
- [Choosing a Withdrawal Cataloging Action](#) on page 78
- [Withdrawing an Item from Reserve](#) on page 81
- [Flagging Items for Withdrawal](#) on page 83
- [Using a Pull List Report](#) on page 85
- [Unarchiving an Item Record](#) on page 85
- [Deleting Reserve Records](#) on page 87

About Withdrawing Items from Reserve

After an item is on reserve for a certain period of time that you determine, you can withdraw the item from reserve. When you withdraw a library item from reserve you can return the item to the owning location—either your library’s main stacks or another collection. If you are withdrawing a non-library-owned item, you can return it to the instructor or owner. If a reserve item is checked out when you need to withdraw it from reserve, you can flag the item for withdrawal. When the item is checked in, Horizon prompts reserve staff members to withdraw the item.

When you withdraw an item from your reserve, you should inactivate the reserve Title record; otherwise, users will still be able to search for the title. You can also set up withdrawal instructions that prompt staff members to do something specific with that item (for example, return the item to the instructor).

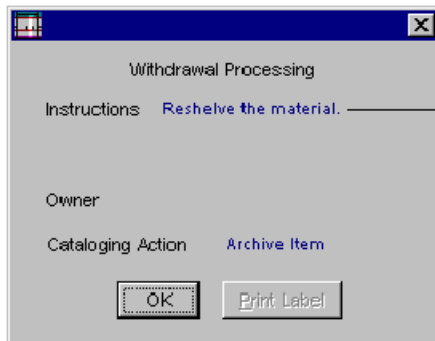
When you withdraw an item from reserve, you can choose to archive the reserve Title and Item records for items that you will likely place on reserve again. (For example, an instructor may place a text book on reserve every other semester.) Archiving reserve records lets you place an item on reserve at a future time without having to create new Instructor, Course, and Title records.



Remember that you must do all reserve tasks in the reserve location. (For instructions on switching to a reserve location, see [Switching to a Reserve Location](#) on page 6.)

Setting Up Withdrawal Instructions

Withdrawal instructions tell a staff member what to do with an item once he or she withdraws it from reserve. (For example, the message may instruct a staff member to return the item to the instructor who owns it or place the item on a shelving cart and return it to the main stacks.)



This message instructs the reserve staff member to return an item to the shelf.

Before a reserve staff member withdraws a reserve item, you can choose the withdrawal instructions that you want for each reserve item. If necessary, you may need to create or edit withdrawal instructions. (For example, you can create withdrawal instructions that tell a staff member to recycle, or throw away an item.)



You may want to set up or choose the withdrawal instructions when you place an item on reserve. (For instructions, see [Editing the Item Record While Placing an Item on Reserve](#) on page 46 or [Placing an Item on Reserve](#) on page 35.)

To set up withdrawal instructions

- 1 Search for the course or instructor linked to the item that you want.
- 2 Click **Titles**.
Horizon displays the Titles for *Course* or the Titles for *Instructor* window.
- 3 Do one of these options:
 - If Horizon displays the Titles for *Instructor* window, highlight the course that you want in the **Courses** field.
 - If Horizon displays the Titles for *Course* window, highlight the instructor whom you want in the **Instructors** field.
- 4 Highlight the title that you want from the list of titles.
- 5 Click **Edit**.
Horizon displays the Edit Reserve Title window.
- 6 Click **Items**.

Horizon displays a list of items for the title.

7 Highlight the item that you want.

8 Click **Edit**.

Horizon displays the Edit Item Edit for RBR window:

9 Click **Codes** to the right of the **Withdr Instr** field.

Horizon displays the Code Lookup window:

Code	Instructions
rf	Return the material to the owning faculty member.
rs	Reshelve the material.

10 Do one of these options:

- If you want to create new withdrawal instructions, click **Add**.
- If you want to edit existing withdrawal instructions, click **Edit**.

Horizon displays the Edit RBR Withdrawal Instructions window:

11 Complete or update these fields:

Field	Action
Code	Enter the code that you want to represent the withdrawal instructions. (For example, enter "RO".)
Instructions	Enter the withdrawal instructions. (For example, enter "Return item to owner".)

12 Save your changes.

Printing Instructor Letters

You can send letters to instructors to inform them when you plan to withdraw their items from reserve. You can give the instructor any instructions or explanations in this letter. (For example, you can tell the instructor to come and retrieve the copy from the reserve location, or explain how to postpone the withdrawal date.) You can compose the instructor letter in the reserve Location record. (For instructions, see [Setting Up a Reserve Location Record on page 13.](#))



You must set up a withdrawal date for any title for which you plan to print an instructor letter. (For instructions, see [Creating a Reserve Title Record on page 33](#) or [Creating a Reserve Title Record on page 55.](#))

Also note that you cannot view the instructor letter before you print it.

Here is an example of an instructor letter:

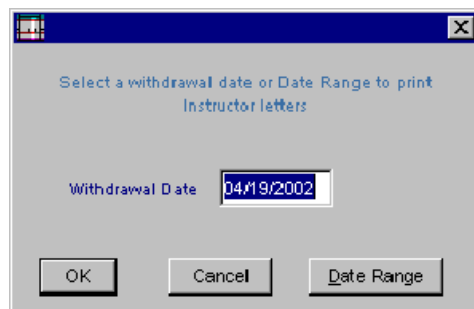
04/19/02	Costigan Library Reserve	Page 1
<p>Hamburg, Walter Music Administration Building 1213 Main Street Weed, California 97970</p> <p>The following titles are scheduled to be removed from reserve at the end of this term. Please notify the library if any of these titles should remain in the reserve location. Thank you.</p>		
Title	Course	Copies
Capricom concerto;Essay no. 1 for orchestra/	Music of the 20th Century	1

To print instructor letters

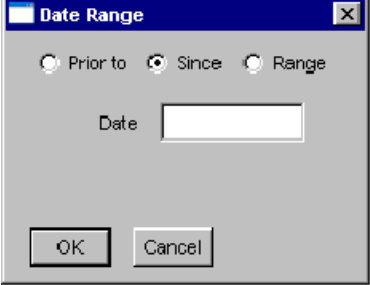
- 1 Start the **Withdrawal: Instructor Letter** process.

The default location of this process is the **Reserve Bookroom\Reports** folder on the navigation bar.

Horizon displays this dialog box:

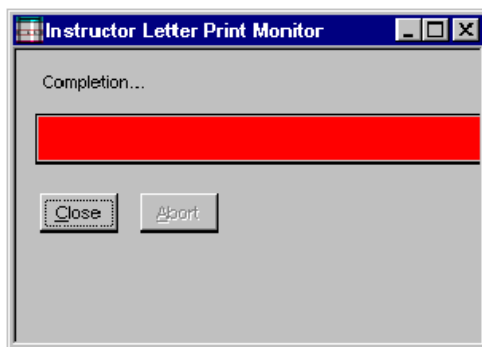


- 2 Do one of these options:

<p>Print instructor letters for items that you plan to withdraw on a specific date</p>	<p>Print instructor letters for items that you plan to withdraw over a range of dates</p>
<p>1. Enter the date in the Withdrawal Date field.</p> <p>2. Click OK.</p>	<p>1. Click Date Range.</p> <p>Horizon displays the Date Range dialog box:</p>  <p>2. Mark one of these options:</p> <ul style="list-style-type: none"> • Prior to. Lets you print instructor letters for items that you plan to withdraw before a certain date. • Since. Lets you print instructor letters for items that you plan to withdraw after a certain date. • Range. Lets you print instructor letters for items that you plan to withdraw between certain dates. <p>3. Enter the appropriate withdrawal date or dates in the Date field.</p> <p>4. Click OK.</p>

- 3 If necessary, change your printer settings, and click **OK**.

Horizon prints the instructor letters according to the withdrawal dates you chose.



- 4 Click **Close**.

Inactivating a Reserve Title

Before or after you withdraw an item from Reserve Bookroom, you should inactivate the Title record; otherwise, users will be able to search for the title depending on the withdrawal cataloging action. When you change the status of the reserve Title record to “Inactive,” users can no longer search for the title in the reserve location (provided that no other ICT records for the bib# at that location are active).



If you have already set a withdrawal date for an item (for example, you may have set a withdrawal date when you placed the item on reserve), Day End will automatically inactivate the reserve title after that date. (For more information about Day End, see “About Maintenance and Day End” in the “Maintenance and Day End” chapter of the *System Administration Guide*.)

Inactivating a reserve title

- 1 Search for the course or instructor linked to the title that you want to inactivate.
- 2 Click **Titles**.

Horizon displays the Titles for *Course* or the Titles for *Instructor* window.

- 3 Do one of these options:

- If Horizon displays the Titles for *Instructor* window, highlight the course that you want in the **Courses** field.
- If Horizon displays the Titles for *Course* window, highlight the instructor whom you want in the **Instructors** field.

- 4 Highlight the title that you want from the list of titles.

- 5 Click **Edit**.

Horizon displays the Edit Reserve Title window:

This title is currently active.

The screenshot shows the 'Edit: Reserve Title' window with the following details:

- Title: General equilibrium. (Archived X)
- Course: 5:5 (1 of 1)
- Course Group: 5 (Introductory course)
- Instructor No.: 5 (Stum, Leonard)
- No. Required: 1
- Date: Res.: 12/28/1995
- Status: Active, Not Active
- Copies Required: Active 0, Not Active 1, Provisional 0
- Maximum Needed: 4
- No. of Items: On Reserve 0, At Other Locations 0, Archived 1

- 6 Mark **Not Active**.

- 7 Save your changes.

Choosing a Withdrawal Cataloging Action

You should also set up or change the withdrawal cataloging action to make sure that Horizon correctly processes the reserve Item and Title records when you withdraw an item. (For example, you may want to set up Horizon to archive both the Title and Item record, or you may choose to discard an Item record that you no longer use.)



You may have set up withdrawal cataloging actions at the time you placed the item on reserve. (For instructions, see [Editing the Item Record While Placing an Item on Reserve](#) on page 46 or [Placing an Item on Reserve](#) on page 58.)

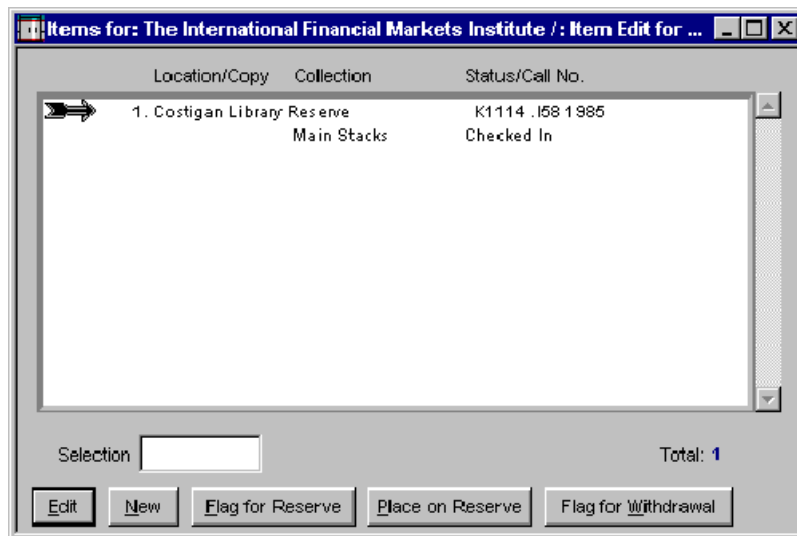
To choose a withdrawal cataloging action

- 1 Search for the instructor or course linked to the item that you plan to withdraw.
- 2 Highlight the course or instructor linked to the title that you want.
- 3 Highlight the title that you want.
- 4 Click **Edit**.

Horizon displays the Edit Reserve Title window.

- 5 Click **Items**.

Horizon lists all of the copies (items) for this title:



- 6 Highlight the item that you want to edit.

Important: Make sure the item that you highlight is located in the reserve library; otherwise, you may inadvertently edit an item that belongs to another location.

- 7 Click **Edit**.

Horizon displays the Edit Item Edit for RBR window:

8 Mark one of these options:

Field	Action
None	<p>If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw this item, mark this option.</p> <p>Important: You should mark this option for all library-owned items that you plan to return to another location, such as “main”.</p>
Discard Item	<p>If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw this item, mark this option.</p> <p>Important: Do <i>not</i> mark this option for a library-owned item. This will delete the Item record from Horizon when you withdraw the item. (For more information, see Withdrawing an Item from Reserve on page 81.)</p>
Discard Item and Bib	<p>If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw this item, mark this option.</p> <p>Important: Do <i>not</i> mark this option for a library-owned item. This will delete the Item or Title record from Horizon when you withdraw the item. (For more information, see Withdrawing an Item from Reserve on page 81.)</p>

Field	Action
Archive Item	<p>If you want to archive the Item record in Reserve Bookroom when you withdraw this item, mark this option.</p> <p>You should choose this option for a non-library-owned item if you plan to place the item on reserve again at a future time. You can also use this option if you want to archive a non-library-owned item, but there are other Item records attached to the item's Title record.</p> <p>Important: Do <i>not</i> mark this option for a library-owned item if you plan to return the item to the owning location. Archiving an item removes the Item record from your library catalog and stores it in Reserve Bookroom.</p> <p>You can archive a library-owned item if you want to remove the item from searching and put it in storage. If you archive a library-owned item, you can restore the item in the main catalog by unarchiving the item. (For instructions, see Unarchiving an Item Record on page 85.)</p>
Archive Item and Bib	<p>If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw this item, mark this option.</p> <p>You should choose this option for a non-library-owned item if you plan to place the item on reserve again at a future time and there is only one Item record attached to the title. You cannot use this option if more than one item is attached to the Bib record, regardless of the item's location. (For example, there may be one copy in the reserve location and a second copy in the main location.) You must archive each Item record for the title before you can archive the Title record.</p> <p>Important: Do <i>not</i> mark this option for a library-owned item if you plan to immediately return the item to the owning location. Archiving an Item and Bib removes both the Item and Title records from your library catalog and stores them in Reserve Bookroom.</p> <p>You can archive a library-owned item if you want to remove the item from searching and put it in storage. If you archive a library-owned item, you can restore the item in the main catalog by unarchiving the item. (For instructions, see Unarchiving an Item Record on page 85.)</p>

9 Save your changes.

Withdrawing an Item from Reserve

When an item is scheduled to be removed from the reserve location, you can withdraw the item and return it to its original location. (For example, you can check a book back in to the main library, or return a book to an instructor.) If you plan to place the item on reserve again, you can choose to save, or archive, the Item record for future use. You can also choose to delete the Item record. (For instructions, see [Choosing a Withdrawal Cataloging Action on page 78](#).)

When you withdraw a library-owned item from reserve, Horizon restores the owning location, ITYPE, collection, and call number that was saved on the Item record.



When you withdraw a library-owned item, make sure the saved location is the owning, or main location. If the Item record does not have a saved location, or if the saved location is the reserve location, Horizon will not return the record to the owning location when you withdraw the item.

To withdraw an item from reserve

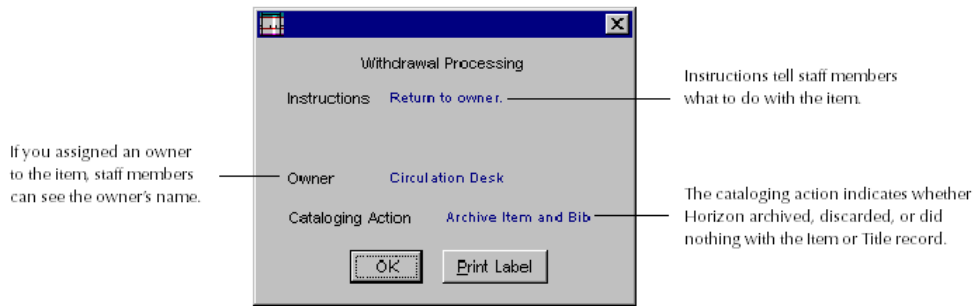
- 1 Start the **Withdraw Items from Reserve** process.

The default location of this process is the **Reserve Bookroom/Reserve** folder on the navigation bar.

Horizon displays the Withdraw Items from Reserve window:

- 2 Do one of these options:
 - Enter the item's barcode in the **Barcode** field, then click **OK**.
 - Scan the item's barcode.
- 3 Click **OK**.

Horizon displays the Withdrawal Processing window:

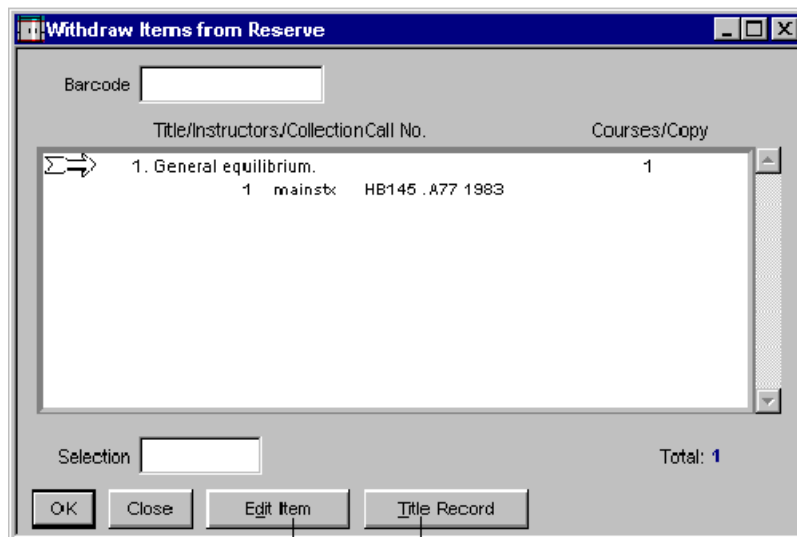


- 4 If you set up Horizon to print withdrawal labels, click **Print Label**.

You must have set up a circulation slip printer in order to print withdrawal labels. (For instructions on setting up this option, see “Setting Workstation Receipt Options” in the *Circulation Setup Guide*.)

- 5 Click **OK**.

Horizon adds the item to the list of withdrawal items:



- 6 If you did not discard the title from Reserve Bookroom and you need to edit the reserve title, click **Title Record**.

For example, you may have forgotten to inactivate the title before you withdrew the item. For instructions, see [Using a Pick List Report on page 42](#).

- 7 Repeat steps 2 through 6 for each item that you want to withdraw from reserve.

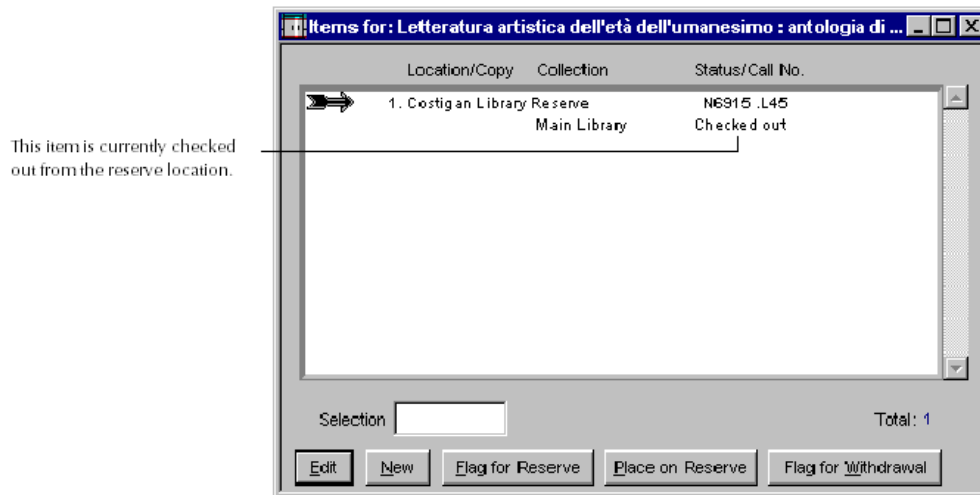
Flagging Items for Withdrawal

If an item is checked out when it is scheduled to go off reserve, you can flag the item for withdrawal from reserve. This places the item on a Pull list. A Pull list is a list of items in the reserve location that need to be returned to their owning location. (For more information, see [Using a Pull List Report on page 85.](#)) Once the items are checked in, Horizon alerts the Reserve Bookroom staff that the item is flagged for withdrawal. The staff member can then withdraw the item from reserve.

Before you begin, make sure you inactivate the Title record for the item you want to flag for withdrawal; otherwise, users will still be able to search for the item in Reserve Bookroom. (For instructions on changing the status, see [Inactivating a Reserve Title on page 77.](#))

To flag items for withdrawal

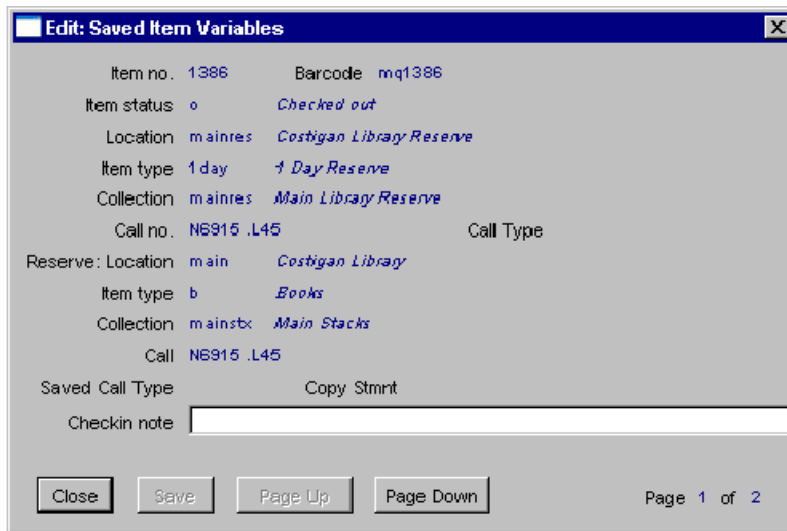
- 1 Search for the course or instructor linked to the items that you want to withdrawal.
- 2 Click **Titles**.
Horizon displays the Titles for *Course* or the Titles for *Instructor* window.
- 3 Do one of these options:
 - If Horizon displays the Titles for *Instructor* window, highlight the course that you want in the **Courses** field.
 - If Horizon displays the Titles for *Course* window, highlight the instructor whom you want in the **Instructors** field.
- 4 Highlight the title that you want from the list of titles.
- 5 Click **Edit**.
Horizon displays the Edit Reserve Title window.
- 6 Click **Items**.
Horizon displays a list of items for the title:



7 Choose the items that you want to flag for withdrawal.

8 Click **Flag for Withdrawal**.

Horizon displays the Edit Saved Item Variables window:



9 In the **Checkin note** field, enter the note that you want to display to reserve staff when the item is returned. (For example, enter “Withdraw this item from reserve.”)

10 Save your changes.

11 When the item is returned, withdraw it from reserve. (For instructions, see [Withdrawing an Item from Reserve on page 81.](#))

Using a Pull List Report

When you need to remove an item from reserve, you can flag the item for withdrawal. You can then generate a Pull List report of all items that are currently checked in and need to be withdrawn. If an item is checked out, you can flag the item for withdrawal. When the item is returned, Horizon adds the item to the Pull List. You can also use a Pull List report to withdraw the items from reserve once they are returned or removed from the shelves.

To use a Pull List report

- 1 Start the **Withdrawal: Pull List** process.

The default location of this process is the **Reserve Bookroom\Reports** folder on the navigation bar.

Horizon displays the List Reserve Bookroom Pull List.

- 2 If you want to print the list, choose **File, Print**.
- 3 If you want to withdraw an item on reserve, click **Withdraw from Reserve**.
Horizon changes the item status and withdraws the item from reserve.
- 4 Close the List Reserve Bookroom Pull List window.

Unarchiving an Item Record

If you want to place an item on reserve again, but you archived the item when you withdrew it from Reserve Bookroom, you can unarchive the Item record and then place it on reserve. If you chose to also archive the bib record when you withdrew the item from reserve, Horizon automatically unarchives the Title record when you unarchive the Item record. Generally, you will only archive records for non-library-owned items. If you unarchive a library-owned item, Horizon returns the Item record to the owning location (for example, the main stacks). If you want to, you can then place the item on reserve again. (For instructions, see [Placing an Item on Reserve on page 35](#).)

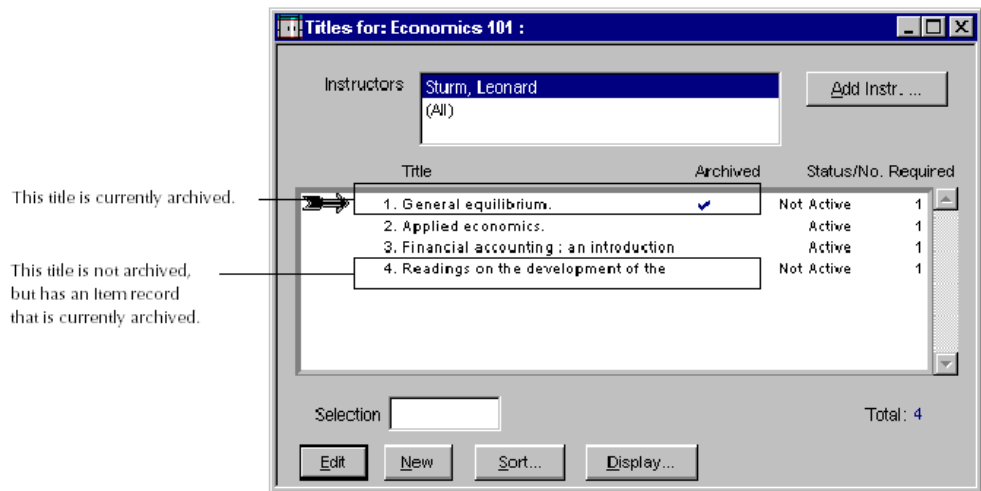


If the owning location of the item is the reserve location, Horizon automatically places the item on reserve when you unarchive the Item record. Most archived Item records for non-library-owned items belong to the reserve location.

To unarchive an item record

- 1 Search for the course and instructor linked to the archived item that you want to place on reserve.
- 2 Click **Titles**.

Horizon displays the Titles for *Course* or the Titles for *Instructor* window:



3 Do one of these options:

- If Horizon displays the Titles for *Instructor* window, highlight the course that you want in the **Courses** field.
- If Horizon displays the Titles for *Course* window, highlight the instructor whom you want in the **Instructors** field.

4 Choose the title for the item that you want to unarchive.

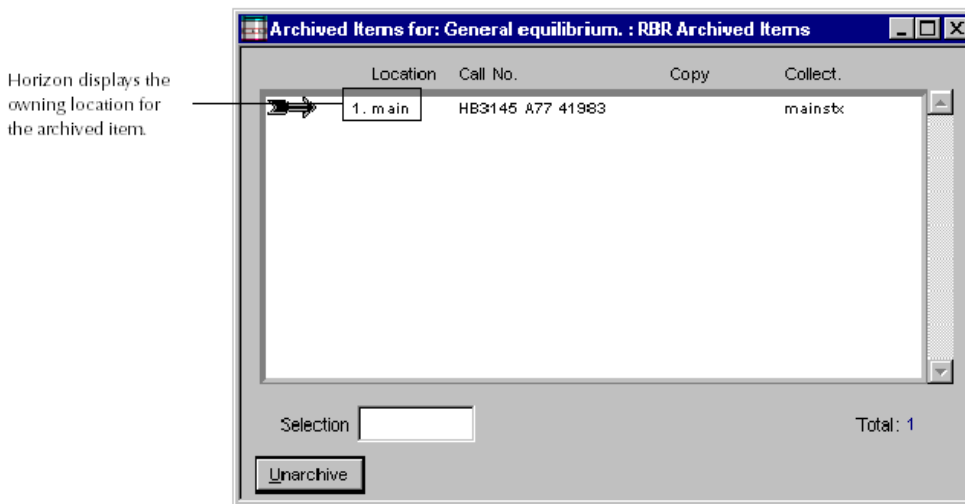
5 Click **Edit**.

Horizon displays the Edit Reserve Title window:



6 Click **Item Archives**.

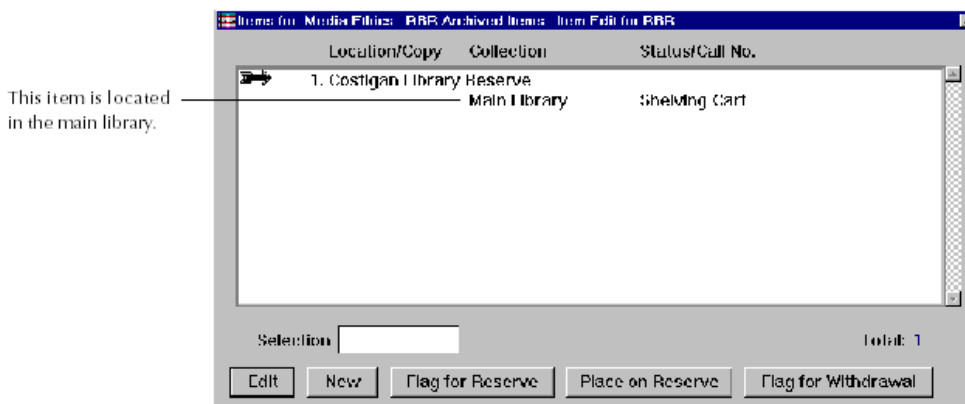
Horizon displays a list of archived items:



7 Highlight one or more items that you want to unarchive.

8 Click **Unarchive**.

Horizon restores the Item record to the owning location:



Note: If the owning location for the item is already the reserve location (for example “Main Reserve”), Horizon automatically places the item on reserve.

9 If you want to, place the item on reserve. (For instructions, see [Placing an Item on Reserve on page 35.](#))

Deleting Reserve Records

Periodically, you may need to delete reserve records. (For example, you may want to delete the Instructor record for an instructor that is no longer on the faculty.) Because reserve records are linked, you must delete reserve records in a certain order. You can unlink reserve records without deleting them from Reserve Bookroom. (For example, before you can delete an Instructor record, you must unlink any titles that are linked to the instructor on the Instructor/ Course /Title [ICT] record.)



You must withdraw an item from reserve before you delete the Item or Title record from Reserve Bookroom. If you delete a title or item from reserve before you withdraw the item, you may delete the Item or Title record from your system. If you choose to discard an Item or Bib record when you withdraw an item, Horizon automatically deletes these records from your system.

This section explains these topics:

- [Unlinking a Reserve Title](#) on page 88
- [Deleting a Reserve Title Record](#) on page 90
- [Deleting an Instructor Record](#) on page 91
- [Deleting a Course Record](#) on page 91

Unlinking a Reserve Title

You can unlink a title from any instructor or course without deleting the record from Reserve Bookroom. Because Title records are linked to both Instructor records and Course records, you must unlink all of the Title records attached to an instructor or course before you can delete the Instructor or Course record from Reserve Bookroom. You may also need to unlink a reserve title if you want to remove the title from one instructor or course, but you want to leave the title linked to another instructor or course. This lets you unlink a reserve title without deleting it from Reserve Bookroom.

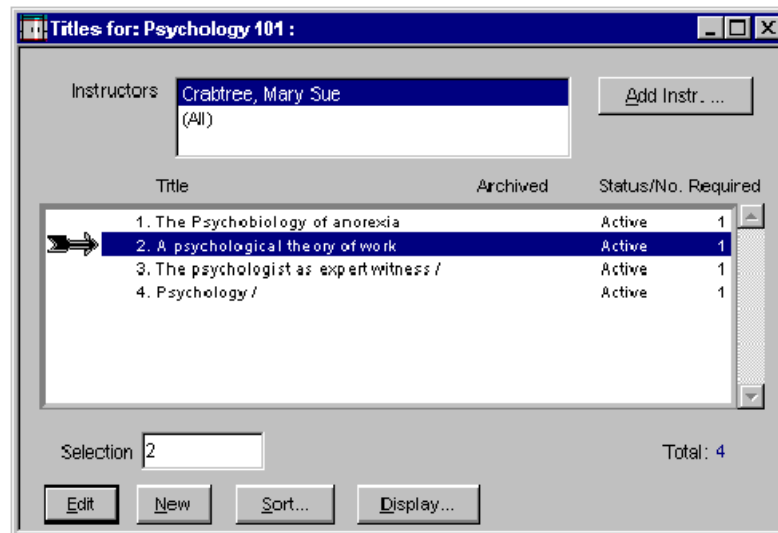
Before you unlink a title that is linked to only one course or instructor, make sure that you have withdrawn any items for the title. (For instructions, see [Withdrawing an Item from Reserve](#) on page 81.) Otherwise, Horizon will not be able to return the record of a library-owned item to the owning location, and you will delete both the Title and Item records from Reserve.

To unlink a reserve title

1 Do one of these options:

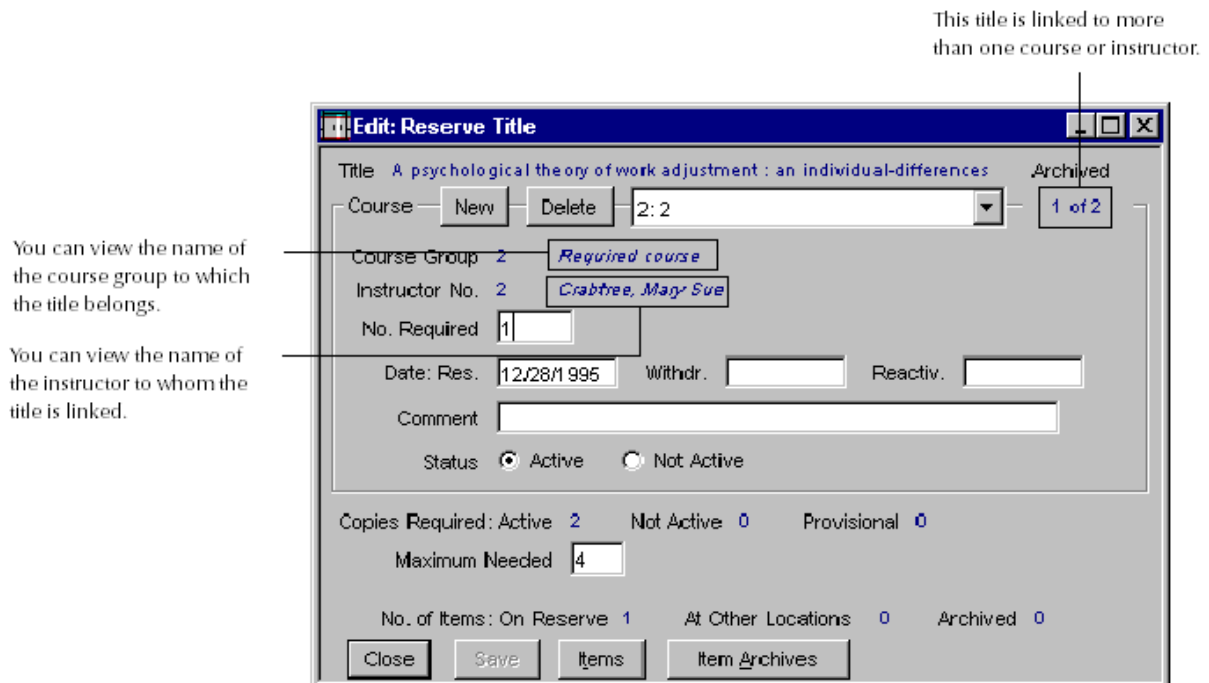
- If you want to unlink a title from an instructor, search for the Instructor record.
- If you want to unlink a title from a course, search for the Course record.

Horizon displays the Titles for *Instructor* or Titles for *Course* window:



- 2 Highlight the title that you want to unlink from the course or instructor.
- 3 Click **Edit**.

Horizon displays the Edit Reserve Title window:

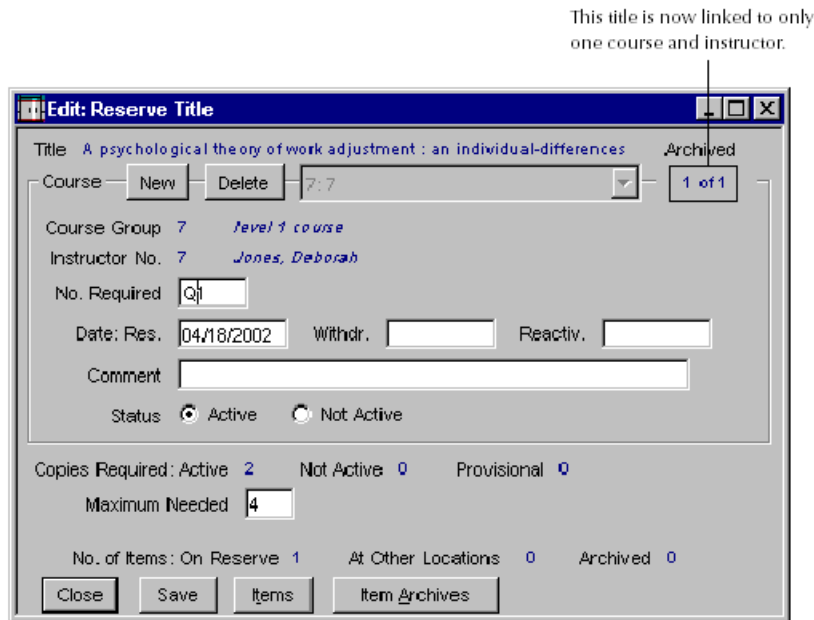


- 4 In the drop-down list for the **Course** group, choose the instructor and course from which you want to unlink this title.

Important: When the title is linked to only one course or instructor, make sure that you have withdrawn any items for the title before you unlink the title. (For instructions, see [Withdrawing an Item from Reserve on page 81.](#))

5 Click Delete.

Horizon unlinks the title from the instructor and course that you chose:



6 Save your changes.

7 Repeat steps 4 through 6 for each instructor and course from which you want to unlink this title.

Deleting a Reserve Title Record

If you no longer use a title in Reserve Bookroom, you can delete the Title record from Reserve Bookroom. If a title is linked to more than one course and instructor, you must unlink the title from each course and instructor before you can delete the title record.



If you have withdrawn any library-owned items from Reserve Bookroom that are attached to a title, then deleting a reserve title does not delete the bibliographic information from your system.

To delete a reserve Title record

- 1** Search for a course or an instructor linked to the title that you want to delete.
Horizon displays the Titles for *Course* or Titles for *Instructor* window.
- 2** Do one of these options:

- If Horizon displays the Titles for *Course* window, choose an instructor from the list of instructors.
 - If Horizon displays the Titles for *Instructor* window, choose a course from the list of courses.
- 3 Highlight one or more titles from the list of titles.
 - 4 Choose **File, Delete Record**.
 - 5 Click **OK**.
- Horizon deletes the record from Reserve Bookroom.

Deleting an Instructor Record

If you need to remove an Instructor record from your reserve location, you can delete it after you unlink or delete any titles attached to the instructor. (For instructions, see [Unlinking a Reserve Title on page 88](#) or [Deleting a Reserve Title Record on page 90](#).)

To delete an Instructor record

- 1 Search for the instructor whom you want to delete.
 - 2 If Horizon displays a list of reserve instructors, choose the one that you want.
 - 3 Choose **File, Delete Record**.
- Horizon deletes the Instructor record from Reserve Bookroom.

Deleting a Course Record

If you need to remove a Course record from your reserve location, you can delete it after you unlink or delete any titles attached to the course. (For instructions, see [Unlinking a Reserve Title on page 88](#) or [Deleting a Reserve Title Record on page 90](#).)

To delete a Course record

- 1 Search for the course that you want to delete.
 - 2 If Horizon displays a list of reserve courses, choose the one that you want.
 - 3 Choose **File, Delete Record**.
- Horizon deletes the Course record from Reserve Bookroom.

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