Circulation Training Guide
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Chapter One

Introduction

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

The Launcher is the look and feel of Horizon—the interface you use to conduct your work. You should have received a Dynix training manual for the Launcher. It is a good idea to review the first chapter in that training manual so you understand how to use the Launcher to access the process (or software tools) you need to perform your library tasks.

Your Navigation bar’s root level displays a Circulation folder that contains all the Circulation processes and subfolders into which other processes are organized. When you click on that folder you will see the hierarchy of the Circulation processes and folders for your library. The Open CKO window, Open CKI window, and Circulation reports are examples of more common Circulation processes.

Working in concert with other processes such as staff searching and Cataloging, you can use Circulation to create and edit borrower records, check items in and out, process borrower requests and holds, generate notices to inform borrowers of circulation matters, and compile and print circulation statistics.
Conventions

This section explains the documentation conventions used in this guide.

**Mouse Conventions**

- **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.
- **Drag.** To press and hold the primary mouse button while moving the mouse.
- **Choose.** To select an option from a menu, group of options, or list.
- **Highlight.** To click once on an option in a list so the option is selected and displays in reverse video. In a field, you may drag the mouse over text to highlight that text.

**Keyboard Conventions**

- Keys on the keyboard are shown in uppercase, bold characters (for example, “the **TAB** key”). The keys on your keyboard may not be labeled exactly as they are in this guide.
- When you are instructed to press two or more keys at the same time, the keys are connected by a plus sign. (For example, **ALT+H** means to hold down the **ALT** key and press the **H** key.)
- Text or numbers that you are instructed to enter using the keyboard are enclosed in quotation marks (for example, enter “main” in the Location field).

**General Conventions**

- This guide refers to the Horizon Sunrise software as “Horizon” (for example, “Horizon saves your changes”).
- In step-by-step instructions, the names of menus, buttons, and other options appear in bold typeface (for example, “the **OK** button” or “the **File** Menu”).
- When you are instructed to choose an option from a menu, the menu and menu options are separated by commas. (For example, “choose **File, Save**” means to choose the File menu, then choose the Save option from the menu.)
- 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 123w0lf.)
Horizon Basics

This guide assumes 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 should know how to activate a Horizon process using either the mouse or keyboard.
The Launcher Workspace

The Launcher workspace starts automatically when you first log in to Horizon. Here is an example of a Launcher workspace:

If your navigation bar is set up to show shortcuts, they display in this column.

You can choose options from the menu bar to activate processes or do tasks. The available menu options vary, depending on where you are in Horizon.

The active window’s title bar displays in a different color from other open windows.

Horizon displays process, record, and other windows in the main Launcher workspace.

You can activate a pop-up list by right-clicking the mouse in the Launcher workspace, or in an open window or record. Pop-up lists give you options that vary depending on where you are in Horizon.

You can click buttons on a toolbar to activate processes and do tasks in Horizon.

If you use the Workbook view, each open window or process has a tab. You can click a tab to activate the window or process.

If you use the Workbook view, each open window or process has a tab. You can click a tab to activate the window or process.

ACTIVATING A HORIZON PROCESS

When you use Horizon, you begin by activating a process. If you have already activated 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 activate a different process.)
You can use different methods to activate 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. Possibilities include
working from menus, clicking on buttons, context sensitive selections by using a right
mouse click, and using keyboard shortcuts.

**USING A MOUSE TO ACTIVATE A PROCESS**

When you use the mouse to activate 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
activate a process:

- **Double-click on a process or tool on the navigation bar.** The navigation bar
  stores processes and tools in folders.
- **Click on a toolbar button.** You can use the toolbar to activate a process only
  if you or your system administrator have added a button for that process.
- **Click on an option from the menu bar.** Choose **Window** and the open
  window or record you want to make active.
- **Click on the window you want.** If you can see part of the window or record
  you want to make active, click on the window.
- **Use the Workbook view.** Click on the tab of the open window or record you
  want to make active.

**USING A KEYBOARD SHORTCUT TO ACTIVATE A PROCESS**

When you use the keyboard to activate 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.

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 you want to activate. (You can use arrow keys, the first
  letter of the process 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.)
- **User-defined keyboard shortcuts.** You can create shortcuts that activate
  Horizon processes when you customize the Launcher.
- **Press ALT+W.** This activates the Window drop-down menu. Then type the
  number of the open window or record 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.
Task Overview

Your system administrator can customize your Launcher. Most customization takes place at the Customize Launcher window. You can access the Customize Launcher window by using the menu bar. If you are a system administrator who is setting up Launcher preferences for a group of users, you should access the Customize Launcher window using the Preference Group Manager.

You can also open the Customize Launcher window by right-clicking anywhere on the Horizon workspace and selecting Customize Launcher from the drop-down menu.

Customizing the Launcher

Your ability to customize your Launcher depends on your security settings. As an example of changes you can make to customize the Launcher, you can determine whether the Launcher occupies the entire screen or a smaller portion. You can display large or small buttons in the Toolbar. You can determine the position and size of the Navigation Bar, the Diacritics Toolbar, and the Diacritics Button Bar.

Additionally, you or your system administrator can customize the Launcher in these ways:

- **Processes and Folders.** You can determine which processes and folders display and where. You can also determine the order in which they list. You can make each workstation distinct and specific, prepared to perform specific tasks and responsibilities within your library.

- **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. You can also decide whether or not to display Tooltips for toolbar buttons.

- **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.

- **Diacritic shortcuts.** You can add, delete, and edit shortcuts to non-keyboard characters (such as the British pound or an accent mark). These shortcuts are available on the Diacritic Shortcut Bar and the Diacritics Button Bar.

- **Workspace background.** You can choose what background image (if any) displays in the Launcher workspace.

- **Startup settings.** You can choose the processes that start automatically, and which folders on the navigation bar open automatically, when you first log in to Horizon. You can also choose to have Horizon windows open maximized when you start any process.
The Customize Launcher window has tabs that let you access these different customization options:

Horizon displays the name of the current user in the window title bar. (The current user is “Release 72 Administrator.”)

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toolbars</td>
<td>You can create new toolbars and decide which toolbars you want to display on the Horizon workspace. You can also choose to display Tooltips.</td>
</tr>
<tr>
<td>Toolbar Buttons</td>
<td>You can add and remove buttons from any toolbar, or create new toolbars to display the buttons for the processes that you need.</td>
</tr>
<tr>
<td>Navigation Bar</td>
<td>You can choose which processes you want to display on the navigation bar and how you want them displayed.</td>
</tr>
<tr>
<td>Diacritics</td>
<td>You can add, edit, or delete diacritic shortcuts. You can also set the font size on the Diacritic Button bar.</td>
</tr>
<tr>
<td>General</td>
<td>You can display images on your workspace background. You can also set windows to open maximized when Horizon starts.</td>
</tr>
<tr>
<td>Start Up</td>
<td>You can set up Horizon to activate any process or open any folders on the navigation bar when you first start the Launcher.</td>
</tr>
</tbody>
</table>
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.
Circulation Basics

Each circulation process is designed to help with a specific part of your workflow. As an example, the Open CKO Window process provides you a place to perform tasks like checking out books and maintaining borrower records. The tasks that you perform in Circulation help you manage how borrowers use your library.

Circulation Processes

When you first install Horizon, the Circulation folder on the Navigation bar contains these folders and processes:

- **Checkout and Checkin.** When you check out an item, Horizon assigns that item to a specific borrower. Other borrowers know when they check the catalog that the item is temporarily unavailable. When you check the item back in, the item is unassigned to the borrower, and the catalog shows the item as available again. Horizon allows you to renew items, check out items to borrowers who have forgotten their cards, checkin items without calculating fines, change due dates, and check out items that ordinarily do not circulate. Circulation lets you print receipts that can help borrowers keep track of what they have checked out and workslips that can help staff members give special attention to items. It uses defaults set by your system administrator to determine loan periods, fine rates, and so forth.

- **Setting and Resolving Blocks.** Circulation can help you control whether certain borrowers can check out items by assigning blocks. Blocks can also be assigned when you need to interact with a borrower in a manner other than basic circulation. This can happen when borrowers violate library policy, when they have books on hold, or when refunds are due them. Horizon keeps a viewable history of a patron’s blocks.

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

- **Fast Adding Records.** Occasionally a borrower may want to check out an item when either the borrower record or the item record does not exist in the database. Circulation gives you the option to quickly add items and borrowers through fast adding.

- **Working with Special Requests.** Horizon lets borrowers electronically request items that are checked out or only available at another location so that when they are returned, the requesting borrower has the first option to check out the item. Once a requested item is returned, Horizon puts it on hold for the requesting borrower. Circulation reports help you organize borrower requests and holds. The request, notice, and report functions of Circulation work together to accomplish their tasks.

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

- **Circulation Reports.** Circulation Reports is currently a separate application that opens outside the Launcher. In other words, Circulation Reports is not integrated into the Launcher—it displays in its own window. From the Circulation Reports submodule, you can access reports that list requests, items on hold, notices to be reviewed, and requests that can be filled at your location. You can also print all notices and reminders for overdue items, fines, and holds from Circulation Reports.
Borrower Records

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

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

This chapter explains these topics:

- Understanding borrower records in Horizon
- Adding a new borrower record
- Adding a new borrower to a shared borrower database
- Opening a borrower record
- Deleting a borrower record
- Renewing a borrower’s registration
- Replacing a lost or damaged barcode
- Setting up a proxy borrower
Understanding Borrower Basics

Here are some general things for you to know about borrower records in Horizon:

**Adding New Fields to the Borrower Search Window**

Your system administrator can customize Horizon to display more specific information about a borrower in the search window. For example, you can display phone number or birth day to help identify a specific borrower when there are several similar names.

In this exercise you will learn how to search for the Carol Bailey born on 4/15/1984:

1. Open the Checkout process.

2. Press **F4** to open the list search Borrower Search window.

3. Enter **Bailey** in the Search for field.
4 Click OK.

You can easily select the correct Carol Bailey with the birthday information displayed.

**MAKING A BORROWER SEARCH LOCATION SPECIFIC**

You can restrict a borrower search to just those borrowers that belong to the location you are logged into. Notice in the last example that the borrowers in the search belong to several different locations:

Follow these steps to conduct a search for Carol Bailey, restricting the results to only those borrowers logged into the current location.

1. Open the Checkout process.

2. Select **Search This Location Only** from the Borrower menu.

3. Press **F4** to start the search.

4. Enter **Bailey** in the Search for field.
Notice that this result list shows just the borrowers in the Main location. Note that “this location” refers to the location that the staff member is currently logged into.

**DUPLICATING BORROWER RECORDS**

You can quickly duplicate an existing borrower’s record. For example, if you are registering multiple members of the same family, it would save time to create the first record and then duplicate it so you don’t have to manually enter common information such as address and phone number for each individual.

Follow these steps to access a borrower record and duplicate it to add another borrower from the same family.

1. Open an existing borrower record:
2 Click **Duplicate**.

3 Edit the new record.

4 Click **Save**.
Adding a New Borrower Record

You can manually add a new borrower record. You can collect information from potential borrowers on a form and add several borrowers to your database at once. Or, you can add a borrower as he or she is checking out.

If the borrower is in a hurry, or if you have a crowd of borrowers waiting for help, you can add just the necessary information for circulation purposes. This is often called Borrower Fast Add.

Your library may or may not use fast add records. If you do use fast add records, then you probably also have a policy that directs their conversion to complete bibliographic records. Fast Adds are discussed later in this document.

Follow these steps to add a new borrower record:

1. Activate the Open CKI Window or Open CKO Window process.
2. Choose Borrower, New Borrower.

Horizon displays a blank Edit New Borrower window:

![Edit New Borrower window]

If your library has customized the Edit New Borrower window, the fields may appear in a different order or have different labels.
3 Add yourself as the new borrower. Add fictitious information in the fields that your customized library window requires. Use these tables as a general guide:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location</strong></td>
<td>Enter the location where the borrower is a patron. (Click Codes for a list of valid locations.) The Exp. Date field—the date the borrower’s registration expires—displays automatically when you assign a location, but you can edit it if needed.</td>
</tr>
<tr>
<td><strong>BTYPE</strong></td>
<td>Enter the borrower type. (Click Codes for a list of valid BTYPEs.) The BTYPE determines the borrower’s circulation privileges, such as loan period, fine rate, and whether fines are charged for closed days.</td>
</tr>
<tr>
<td><strong>Exp. Date</strong></td>
<td>Enter the date the borrower’s library privileges will expire unless they are renewed.</td>
</tr>
<tr>
<td><strong>Pin#</strong></td>
<td>If your borrowers need a special code to access some of your library’s features, such as remote access, enter the code or pin number here.</td>
</tr>
<tr>
<td><strong>Language</strong></td>
<td>If your borrowers primarily speak another language, you can enter that information here. (Click Codes for a list of valid languages.)</td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>Enter the borrower’s last name, then first name.</td>
</tr>
<tr>
<td><strong>ID</strong></td>
<td>Enter a second ID for the borrower. This ID could be a social security number or e-mail alias. (Your library determines what the ID should be.) The ID becomes an alternative way to search for and identify a borrower.</td>
</tr>
<tr>
<td><strong>Phone and Type</strong></td>
<td>Enter one or more phone numbers for the borrower. For each phone number you enter, you must enter a corresponding type, such as home or work.</td>
</tr>
<tr>
<td><strong>Barcode</strong></td>
<td>Enter one or more barcodes for the borrower.</td>
</tr>
</tbody>
</table>
4 Click **Page Down** or resize the window to display the fields shown in this example:

4 Click **Page Down** or resize the window to display the fields shown in this example:

5 Complete the applicable fields with fictitious information:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Addr. Type    | Do one of these:  
|               | • Mark the **Perm** button to specify that the address is permanent.  
|               | • Mark the **Temp** button to specify that the address is temporary. |
| Begin and End | Enter the beginning and ending dates that a temporary address is valid. |
| Lines         | Enter the address.  
|               | You may want to specify a company name, the street number, a post office box, an office number, or any other identifying address information. (You do not need to use all four lines.)  
|               | If your system administrator has *not* established city and state codes for your borrowers’ addresses, you can enter the city and state in line 4 of this field. *Do not enter city and state information here if it exists in the City, ST field of the record.* |
| Postal Code   | Enter the postal code. |
| City, ST      | If your system administrator has established city and state codes for your borrowers’ addresses, you can enter one in this field. (Click **Codes** for a list of valid city and state codes.) |
6 Click **Save**.

7 Click **Close**.

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

**OPENING A BORROWER RECORD**

You can open a borrower record once you identify the borrower and display the borrower in the Checkout window.

**Follow these steps to open a borrower record:**

1. Activate the **Open CKO Window** process.
   
   Circulation opens the Checkout window.

2 Identify the borrower. If you do not know the borrower’s barcode number, you can select Borrower, Find Borrower (F4) and enter the borrower’s name that you want to access. If you have the borrower’s library card (or if you know the barcode number), simply enter it into the system.

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

3 Choose **Borrower, Edit Borrower**.
Horizon displays an Edit Borrower window containing the borrower’s record.
Editing a Borrower Record

You can edit existing borrower information in the Edit Borrower window. (For example, if a borrower changes telephone numbers, you can replace the old one with the new one.) You can also enter additional borrower information to make the borrower record more complete. (For example, if you fast-add a borrower at the time of checkout but have a registration card with more information on it, you can enter the rest of the information at a later date.)

Follow these steps to edit a borrower record:

1. Activate the **Open CKO Window** process.
   Circulation opens the Checkout window.
2. Identify the borrower.
   Horizon displays the borrower’s name in the Checkout window.
3. Choose **Borrower, Edit Borrower**.
   Here is an example of an Edit Borrower window:

4. Edit these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter the location where the borrower is a patron. (Click Codes for a list of valid locations.)</td>
</tr>
<tr>
<td><strong>In this field</strong></td>
<td><strong>Do this</strong></td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Btype</td>
<td>Enter the borrower type (Btype). (Click <strong>Codes</strong> for a list of valid Btypes.) The Btype determines the borrower circulation privileges, such as loan period, fine rate, and whether fines are charged on closed days.</td>
</tr>
<tr>
<td>Exp. Date</td>
<td>Enter the date the borrower’s library privileges will expire.</td>
</tr>
<tr>
<td>Pin#</td>
<td>If your borrowers need a special code to access some of your library’s features, such as remote access, enter the code or pin number here.</td>
</tr>
<tr>
<td>Language</td>
<td>If your borrowers primarily speak another language, you can enter that information here. (Click <strong>Codes</strong> for a list of valid languages.)</td>
</tr>
<tr>
<td>Name</td>
<td>Enter the borrower’s last name, then first name.</td>
</tr>
<tr>
<td>ID</td>
<td>Enter a second ID for the borrower. This ID could be a social security number or e-mail alias. (Your library determines what the ID should be.) The ID becomes an alternative way to search for and identify a borrower.</td>
</tr>
<tr>
<td>Birthdate</td>
<td>Enter the birth date of the borrower.</td>
</tr>
<tr>
<td>Note</td>
<td>Enter any notes about the borrower.</td>
</tr>
<tr>
<td>Phone and Type</td>
<td>Enter one or more phone numbers for the borrower. For each phone number you enter, you must enter a corresponding type, such as home or work.</td>
</tr>
</tbody>
</table>

5. Click **Page Down** or resize the window to display the fields shown in this example:
6 Edit these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Addr. Type    | Do one of these:  
• Mark the **Perm** radio button to specify that the address is permanent.  
• Mark the **Temp** radio button to specify that the address is temporary. |
| Begin and End | Enter the beginning and ending dates that a temporary address is valid. |
| Lines         | Enter the address.  
You may want to specify a company name, the street number, a post office box, an office number, or any other identifying address information. (You do not need to use all four lines.)  
If your system administrator has not established city and state codes for your borrowers’ addresses, you can enter the city and state in line 4 of this field. Do not enter city and state information here if it exists in the City, ST field of the record. |
| Postal Code   | Enter the postal code. |
| City, ST      | If your system administrator has established city and state codes for your borrowers’ addresses, you can enter one in this field. (Click **Codes** for a list of valid city and state codes.) |
| Mail Sort Type| Specify how mail to the address is sorted, such as by domestic criteria (zip) or foreign (country). (Click **Codes** for a list of sort types.) |
| Notice By     | Specify whether notices are sent by standard form (mail) or e-mail. |
| Email: Name   | If you chose to send notices by e-mail, enter the borrower’s name in this field.  
This field is for information only. The data you enter in this field is put on the e-mail header. |
| Addr.         | If you chose to send notices by e-mail, enter the borrower’s entire e-mail address in this field.  
Horizon uses this address to send e-mail notices to borrowers. |
7 Click **Page Down** or resize the window to display the fields shown in this example:

![Image of Edit: Borrowers window]

8 Edit these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode (in the Barcodes group)</td>
<td>Enter one or more barcodes for the borrower.</td>
</tr>
<tr>
<td>Barcode (in the Proxy group)</td>
<td>Enter one or more barcodes for borrowers who can check out items on behalf of the current borrower. (Click <strong>Find Borrower</strong> to open a search window to search for and add proxy borrowers.) Proxy borrowers might include student assistants, research assistants, or administrative assistants.</td>
</tr>
</tbody>
</table>
9 Click Page Down or resize the window to display the fields shown in this example:

![Image of the Borrowers window](image)

10 Edit these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stat Class</td>
<td>Enter the borrower’s statistical classes, which are library-defined categories. (Click Codes for a list of valid stat classes.)&lt;br&gt;You use the stat class to collect circulation statistics.</td>
</tr>
<tr>
<td>Security Group</td>
<td>Enter the borrower’s security groups, which are library-defined categories. (Click Codes for a list of valid security groups.)&lt;br&gt;You use security groups to secure bib records so that only those borrowers belonging to certain security groups can view selected bib records.</td>
</tr>
<tr>
<td>PAC Access Type</td>
<td>If you have defined flavors for PAC, enter the code in this field. (Click Codes for a list of valid PAC access types.)</td>
</tr>
</tbody>
</table>

11 Click Save.

12 Click Close.

Horizon returns to the Checkout window with the borrower identified.
Deleting a Borrower Record

You can delete a borrower record if you no longer need it. However, make sure that all outstanding issues (items checked out to borrower, fines due, and so forth) are resolved first.

Follow these steps to delete a borrower record:

1. Activate the **Open CKO Window** process.
   Circulation opens the Checkout window.

2. Identify the borrower.
   Horizon displays the borrower’s name in the Checkout window.

3. Choose **Borrower, Edit Borrower**.
   Horizon displays an Edit Borrower window containing the borrower’s record:

   ![Edit Borrower Window]

   4. Choose **Borrower, Delete Borrower**.
      You are prompted to confirm the deletion.

   5. Click **OK**.
      Horizon deletes the record and returns to an empty Checkout window.
**Renewing a Borrower’s Registration**

Your system administrator can set a time period after which borrower records need to be renewed. When the time period is reached, Horizon prompts you to renew the borrower’s registration. You have the option to proceed with the renewal, cancel the checkout and renewal procedure, or override the renewal procedure and continue with checkout. If you override the renewal prompt, Horizon prompts for renewal the next time you identify the borrower.

Horizon can be set up to automatically prompt you to update a borrower’s registration. The period between renewals is determined by library policy and set by your system administrator as part of each borrower’s Btype. You can also open a borrower’s record at any time and change the expiration date.

**Follow these steps to renew a borrower’s registration:**

1. Activate the **Open CKO Window** process.
   - Circulation opens the Checkout window.

2. Identify the borrower.
   - If the borrower’s registration has expired, Horizon displays an Expire Library Registration window.

3. Click **Renew**.
   - Horizon displays the Edit Renew Registration window.

4. Update any information that has changed.
   - (For example, you can verify the borrower’s address and phone number.)

5. Click **Save**.

6. Click **Close**.
   - Circulation renews the borrower’s registration and returns you to the Checkout window with the borrower’s name displayed. You can proceed with checkout procedures.
Replacing a Lost or Damaged Barcode

You may need to replace a borrower’s barcode. The borrower’s card may have been lost, or the barcode may no longer be readable because it is worn or damaged. If a barcode is ever used after it is marked lost in Horizon—either by the original owner or by someone else—a message displays explaining that this barcode has been reported lost. If this happens, you can do one of these things:

- **Activate the lost barcode.** In this case the original owner would have two viable barcodes.
- **Cancel the circulation procedure.** In this case the lost barcode remains lost and unusable.
- **Delete one of the barcodes in the borrower record and destroy the card with the deleted barcode.** (If you recycle cards instead of destroying them, recycle the card.) In this case the original owner keeps only one viable barcode.

**Follow these steps to replace a lost or damaged barcode:**

1. **Activate the Open CKO Window process.**
   Circulation opens the Checkout window.

2 **Identify the borrower.**
   Horizon displays the borrower’s name in the Checkout window.

3 **Choose Borrower, Edit Borrower.**
   Horizon displays the Edit Borrower window for the borrower.

4 **Click Page Down** or resize the window to display the Barcodes group.

5 **In the Date Lost field of the Barcodes group, enter the date that the borrower reported the card lost.**

6 **Click New in the Barcodes group.**

7 **Enter the new barcode in the Barcode field.**

8 **Click Save.**

9 **Replace the barcode on the borrower’s card with a new barcode, or replace the entire borrower’s card, if necessary.**

10 **Click Close.**
   Horizon closes the Edit Borrower window and returns you to the Checkout window where you can proceed with checkout procedures.
Setting Up a Proxy Borrower

The proxy borrower feature lets a borrower designate a proxy to checkout library materials for him. (For example, faculty members can authorize a proxy such as a research assistant or secretary to check out library materials in their name.) An authorizing borrower may have multiple proxies.

When proxies are appointed, they are usually given a proxy library card or barcode to check out materials for their authorizing borrower. When proxies use the library, the circulation privileges pertaining to their authorizing borrower apply.

If a proxy already has a library card of his or her own, he or she can use the proxy card or barcode when performing library transactions in the authorizing borrower's name. The proxy uses his or her own card or barcode when using the library for personal use. (For example, the proxy may be a student with personal library privileges in addition to proxy privileges.)

When a proxy checks out materials for their authorizing borrower, the items checked out go on the authorizing borrower’s record. Likewise, all notices go to the authorizing borrower, as do any pertaining blocks. Ultimately, the authorizing borrower is responsible for items checked out by their proxies.

Use basic checkout procedures for circulating items to proxy borrowers.
**Linking Proxies to Authorizing Borrowers**

You link proxies to an authorizing borrower in the authorizing borrower’s record. You can link one or more proxies to a single authorizing borrower.

**Follow these steps to link proxies to authorizing borrowers:**

1. Activate the **Open CKO Window** process.
   
   Circulation opens the Checkout window.

2. Identify the authorizing borrower.
   
   Horizon displays the authorizing borrower’s name in the Checkout window.

3. Choose **Borrower, Edit Borrower**.

   Horizon displays an Edit Borrower window containing the authorizing borrower’s record.

4. **Page down** or resize the window to display the **Proxy Bor** group.

5. Click **New** in the Proxy Bor group.

   (For the first proxy borrower, you can skip this step and go to the next step. The first group entry is always considered new.)

6. Click **Find Borrower** in the Proxy Bor group.

   Horizon displays the Search window.

7. Search for the proxy borrower.

---

Proxy borrowers must exist as independent borrowers before they can be a proxy borrower. If there is no record for the borrower you want to use as a proxy, you must create one.

---

When you find the proxy borrower, Horizon displays that borrower’s number in the Proxy Borrower display field, the borrower’s name in the Name display field, and the expiration date of the authorizing borrower’s record in the Expire Date field.

8. Enter the barcode number that the borrower will use when checking out items as proxy.

9. Leave the **Date Lost** field blank unless the proxy borrower loses the card with the proxy barcode on it.
10 If you want to change the date the proxy borrower’s privileges as proxy expire, enter the new date in the **Date Expire** field.

If the authorizing borrower’s record expires before the expiration date you enter here, the proxy privileges end when the authorizing borrower’s record expires.

11 Click **Save**.

12 Repeat steps 5 through 11 for each proxy you want to add.

13 Click **Close**.
Exercises

1.

2.

3.

4.

5.

6.
Circulation helps keep track of where your library items are when they are taken by borrowers. When you check out an item to a borrower, Horizon temporarily assigns that item’s record to that borrower’s record, so you know which borrower is responsible for which item. When you check the item back in, the item record is unassigned to the borrower’s record and the catalog shows the item as available again.

Sometimes a borrower may want to keep an item for longer than the established borrowing period. You can renew items, letting the borrower keep them for an extended period. Circulation also lets you check out items to borrowers who have forgotten their cards, check in items without calculating fines, and change the due date of an item when you check it out.

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

Circulation uses the circulation privilege defaults set by your system administrator to determine loan periods, fine rates and so forth.

This chapter explains these topics:

- Checkout
- Checkin
- Switching between Checkin and Checkout
- Searching for an item in Checkout or Checkin
- Viewing in-house use information for an item
- Printing circulation receipts and workslips
Ordinarily, checking out an item involves identifying a borrower and scanning or entering the barcode of items the borrower wants to use. There are times, however, when more is needed. For example, you may need to renew or recall items, or replace a damaged barcode.

You can have Horizon display the borrower name and Btype in the Checkout window. Your system administrator determines whether or not Lost and Claimed Returned items display in the Checkout window.

This section explains these topics:
- Standard Checkout
- Editing item information in Checkout
- Searching for borrowers in Checkout
- Listing all items currently checked out to a specific borrower
- Renewing items
- Recalling items
- Changing the item status to “Lost” or “Claimed Returned”
- Changing the due date and time during Checkout
- Setting an indefinite due date

**DOING A STANDARD CHECKOUT**

Standard checkout refers to the checking out items under normal conditions, which is the system default checkout mode. Occasionally you may need to check out items under special conditions, like renewing an item already checked out, or changing the due date and time. These special conditions are discussed later in this chapter.

To check out items to borrowers, you identify the borrower and the items to be checked out. When you do these steps, Circulation adds the new item to the list of items checked out by the borrower and calculates and displays the due date. Circulation keeps track of the checked-out items and imposes fines if the borrower does not return an item on time.

You can clear the Checkout window at any time by clicking **Clear**.

**Follow these steps to do a standard checkout:**

1. Activate the **Open CKO Window** process.

   The default location of this process is the **Circulation** folder on the navigation bar.
Circulation opens the Checkout window:

2. Scan the borrower’s barcode label.

You can also enter the borrower’s barcode number in the Item or Borrower Barcode field, then click OK, or press ENTER.

Horizon displays the borrower’s name in the Borrower display field.

---

A number of different message boxes may display when you identify a borrower. If a message box displays, follow the instructions to resume or cancel checkout procedures. If you do not understand the message, see your system administrator.

---

3. Scan the item’s barcode label.

You can also enter the item’s barcode in the Item or Borrower Barcode field and click OK, or press ENTER.

Circulation checks out the item, relaying an audible signal and displaying the item in the Items Out list box.

4. Repeat Step 3 for any other items the borrower wants to check out.

You do not need to re-enter the borrower for each item. Circulation retains the borrower until you identify another borrower.
The Items Checked Out list shows only the items checked out during the current session. To see all items the borrower currently has checked out, including those from previous sessions, click the All Items Out button.

5. You can get additional information from these buttons on the Checkout window:
   • **Blocks.** Click to open a list of current blocks for the borrower identified in CKO.
   • **Edit Item.** Click to edit circulation information for the item identified in CKO.
   • **All Items Out.** Click to display all items associated with a borrower, including items with the status of “Lost” and “Claimed Returned, if applicable.”

6. When you are through checking out items to the current borrower, you can print a borrower receipt so the borrower has a record of what items were checked out and when they are due back.

   If you use another method to remind borrowers of item due dates, be sure to use it.

   (For example, you might need to stamp a due date slip, or apply a due date sticker to the item.)

   If you use a security system such as 3M or CheckPoint, be sure to treat the item before giving it to the borrower, so that it will not set off the security system.
Editing Item Information in Checkout

Once you have checked out items to a borrower, you can view and edit the item’s circulation information from the Checkout window. Some information, such as due date and time, can be edited only at the time of checkout. If you try to edit a part of the item’s circulation that cannot be edited, Horizon displays this message:

This section explains how to:

- Edit a single item.
- Edit more than one item at a time.

Follow these steps to edit single item information in Checkout:

1. Activate the Open CKO Window process.
   The default location of this process is the Circulation folder on the navigation bar.
   Circulation opens the Checkout window.

2. Identify a borrower who has items checked out.
   Horizon displays the borrower’s name in the Borrower display field.

3. Click All Items Out.
   Horizon displays a list of all the items currently checked out to the borrower.

4. Highlight the item you want to edit.

5. Click Edit Item.
Horizon displays the Edit Checkout window:

6. You can edit these parts of the item’s circulation information:
   • **Barcode.** Edit the item’s barcode, if necessary. (Item barcodes are usually edited in Cataloging.)
   • **Due Date/Due Time.** Enter the new due date or time here. If you are changing the due time, be sure to mark the appropriate AM or PM button.

   ![Edit Checkout Window](image)

   You need to enter the century when you enter dates before the year 1908 and after the year 2007. (For example, if the date were 01-01-1997, you only need to enter “97” as the year.)

   • **Note.** If necessary, enter a note about the item. Horizon displays this note on the Checkin and Checkout screens.
   • **Internal Note.** Enter any comments about this item to be viewed by library staff.

7. When you are finished editing the item, click **Save.**

8. Click **Close.**

   Horizon returns to the Checkout window.

**Follow these steps to edit more than one item’s information at a time in Checkout:**

You can edit the Due Date and Time only for a batch of items.
1. Activate the **Open CKO Window** process.
   
The default location of this process is the **Circulation** folder on the navigation bar.
   
   Circulation opens the Checkout window.

2. Identify a borrower who has items checked out.
   
   Horizon displays the borrower’s name in the Borrower display field.

3. Click **All Items Out**.
   
   Horizon displays a list of all the items currently checked out to the borrower.

4. Highlight the items you want to edit.

5. Click **Edit Item**.

6. Horizon displays this dialog box:

   ![Batch change Message dialog box](image)

   7. Click **OK** to make changes for the Highlighted items.

   Horizon displays the Batch Change Checkout window:

   ![Batch Change: Checkout window](image)

   8. When you finish editing the item, click **Save**.

   9. Click **Close**.

   Horizon returns to the Checkout window.
Searching for Borrowers in Checkout

There are several ways to find a borrower record in Circulation. The easiest way is to scan the borrower’s barcode label. You can also enter the borrower’s barcode manually from the keyboard. There are times, however, when this is not possible. (For example, the barcode label may be torn, missing, or too dirty for the scanner to read.)

If a borrower forgets his or her card and does not know the number, you can look up the borrower’s information. You can search by alphabetical last name listing or by keywords from the borrower’s name. You can also search by borrower alias, borrower record number, or by the barcode of an item the borrower has checked out. These search criteria are library-defined.

The most common search is for a borrower’s name. You search for the name in the borrower records, then send the record to Checkout and complete the checkout process.

**Using a Barcode Prefix**

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

**Using Second IDs**

Many libraries set up a second ID (in addition to the barcode) which can be entered in the Borrower Barcode field to identify a borrower. (For example, some libraries use borrowers’ social security or student numbers for second IDs.) Second IDs are sometimes referred to as borrower aliases.

**Follow these steps to search for borrowers in Checkout:**

1. **Activate the Open CKO Window process.**
   
   The default location of this process is the Circulation folder on the navigation bar.
   
   Circulation opens the Checkout window.

2. **Start a borrower search.**
   
   To do this, press F4 or choose Borrower, Find Borrower.
Horizon displays the Search window:

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

3. Highlight the search index you want in the Indexes list.
4. Enter the required information in the Search for field.
5. Click OK.

One of these things happens:

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

If the name you enter into an alphabetical search index does not exist in the borrower database, the selector arrow will point at the name that is closest in spelling to the one you entered. You can then cancel the search and add the borrower to the database.

Horizon displays the name you selected in the Borrower display field. With the borrower name entered, you are ready to continue with the checkout process.
Listing All Items Currently Checked Out to a Specific Borrower

You can list all items currently checked out to a borrower in the Checkout window. When you identify a borrower in Checkout, Horizon displays an empty list. As you check out items to the borrower, the newly checked out items display in the list. However, the borrower may have other items checked out as well.

Follow these steps to list all items currently checked out to a specific borrower:

1. Activate the Open CKO Window process.
   Circulation opens the Checkout window.

2. Identify the borrower.
   Horizon displays the borrower’s name in the Checkout window.

3. Click All Items Out, or choose CKO, All Items Out.
   Horizon displays a list with all items checked out to the borrower, including items with the status of “Lost” and “Claimed Returned,” if that is how your system is profiled to work.
Renewing Items

In Circulation, you can renew one or more items at a time for a borrower. When you renew all items out to a particular borrower, Horizon does not renew those items with a current status of “Lost” or “Claimed Returned.”

These conditions govern whether a borrower can renew an item:

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

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

- **Renewal Due Date.** Your system administrator sets the renewal due date as library policy. Depending on the borrower’s and the item’s classifications (Btype and Itype), the renewal loan period may be shorter than the original checkout loan period.

**Follow these steps to renew items:**

1. Activate the **Open CKO Window** process.
   Circulation opens the Checkout window.

2. Identify the borrower.
   Horizon displays the borrower’s name in the Checkout window.

3. Click **All Items Out**.
   Horizon displays a list of all items checked out to the borrower.

4. Do one of these options:

<table>
<thead>
<tr>
<th>To renew one item</th>
<th>To renew all items</th>
<th>To renew some items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do one of these options:</td>
<td>Do one of these options:</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td>• Enter the item barcode in the <strong>Item or Borrower Barcode</strong> field.</td>
<td>• Renew one item at a time.</td>
<td>• Renew one item at a time.</td>
</tr>
<tr>
<td>Horizon asks if you want to renew the item. Click <strong>Yes</strong>.</td>
<td>• Highlight all the items. Then choose <strong>CKO, Renew</strong>.</td>
<td>• Highlight the items you want to renew. Then choose <strong>CKO, Renew All</strong>.</td>
</tr>
<tr>
<td>• Highlight the item you want to renew. Then choose <strong>CKO, Renew.</strong></td>
<td>• Choose <strong>CKO, Renew All</strong>.</td>
<td></td>
</tr>
</tbody>
</table>
Horizon displays a message asking if the items are present:

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

5. Do one of these options:
   - If the items are present, click Yes.
     Horizon renews the items and displays the new due date in the list box.
   - If the items are not present, click No.
     Horizon counts the renewal as a phone renewal.
   - If you do not want to renew the item, click Cancel.
     This option cancels the renewal.

     If you have a question about selecting Yes or No, check your library policy.

     A message displays if the borrower has reached his or her limit for the selected item. You can override the renewal limit if you are authorized to do so.
Recalling Items

You can recall items that have been checked out but which need to be returned to the library before the due date. When you recall items, Horizon calculates a new due date. You can manually change that due date by entering the new one.

If your library guarantees loan periods, the recall due date will calculate the new due date based on that guaranteed loan period. Day End will generate a notice to be sent to the borrower who has the item.

Follow these steps to recall items:

1. Activate the Open CKO Window process.
   Circulation opens the Checkout window.
2. Do one of these options:
   • If the reason for the recall is a borrower request, identify the requesting borrower.
   You can also search for the borrower later in the process.
   • If the reason for the recall is something other than a borrower request, minimize the Checkout window.
   To do this, click on the minimize box in the upper-right hand corner of the Checkout box.

   If you have a borrower displayed in the CKO window, Horizon uses that borrower information when issuing the recall. If you do not want to use current borrower details for a recall, make sure the CKO window is empty or minimized.

   To do this, press F2 or find the process in the Searching folder on the navigation bar.
4. Search for the item.
5. Highlight the item.
6. If necessary, click Show Detail to display the Bibliographic Detail window.
7. Click Show Copies to display the Copies window.
8. Highlight the copy to recall.
9. Press F10 or choose Edit, Send to.
10. Double-click on **Recall Item** in the list.

Horizon displays the Recall Item window:

11. Complete the following fields:

<table>
<thead>
<tr>
<th><strong>In this field</strong></th>
<th><strong>Do this</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason</td>
<td>Enter the reason for the recall. Click <strong>Codes</strong> for a list of valid options.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter any additional comments you want printed on the Recall Notice.</td>
</tr>
<tr>
<td>Location</td>
<td>Make sure the location is correct. If it is not, enter a new location. Click <strong>Codes</strong> for a list of valid locations. The location should be the item’s owning location, so that the checkin clerk knows where to send the item if it is checked in at another location.</td>
</tr>
<tr>
<td>New Due Date</td>
<td>Change the due date, if necessary.</td>
</tr>
</tbody>
</table>

12. Click **OK**.
If this is a borrower request and you have not already identified the requesting borrower, Horizon displays the Borrower Search window.

13. If necessary, identify the borrower.

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

14. Click **OK** to complete the process.
Changing Item Status to “Lost” or “Claimed Returned”

Your system administrator determines (by location) whether or not to display Lost and Claimed Returned items in the checkout window when displaying and counting all the items a borrower has checked out. The system administrator also determines whether or not Lost or Claimed Returned items display in PAC searches.

Horizon automatically ages an item to a status of “Lost.” You can manually set the status of an item to “Lost” or “Claimed Returned” from the Checkout screen.

Follow these steps to set the status of an item to “Lost” or “Claimed Returned”:

1. Activate the Open CKO Window process. Circulation opens the Checkout window.
2. Identify the borrower reporting the item Lost or Claimed Returned.
3. Press All Items Out to display a screen like the following:

   ![Checkout Window]

4. Select the Lost or Claimed Returned item from the list.
5. Select CKO, Lost or CKO, Claimed Returned to set the status of the selected item to “Lost” or “Claimed Returned” as applicable and click OK. (Horizon changes the list display to reflect the change in status.)
Changing the Due Date and Time During Checkout

Although due dates and times are calculated automatically, you can adjust a due date or a due time for a borrower. You can edit the due date and due time with the Edit Item command.

Follow these steps to change the due date and time during checkout:

1. Activate the Open CKO Window process.
   Circulation opens the Checkout window.
2. Identify the borrower.
   Horizon displays the borrower’s name in the Checkout window.
3. Do one of these options:
   • Identify the item.
   • If the item is already checked out to the identified borrower, click All Items Out.
     Horizon displays the item in the list box.
4. Highlight the item in the list box.
5. Click Edit Item.
   Horizon displays the Edit Checkout window.
6. Make whatever changes are necessary in the Due Date and Due Time fields.
   Make sure to mark the appropriate AM or PM button.
7. Click Save.
   Horizon displays the Checkout window showing the new due date or time in the list box.
Setting an Indefinite Due Date

Some loaned items may have an indefinite due date. This is sometimes referred to as a permanent loan or an indefinite loan. Items on permanent loan may be recalled and loaned to other patrons, then returned to the original borrower after checkin.

In Horizon, any due date past 12-31-2049 would display as an indefinite due date on the Checkout window. You can set an indefinite due date by editing the due date during checkout and entering a date beyond 12-31-2049.

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You or your system administrator can set up a loan period exception that automatically calculates a due date beyond 12-31-2049.

-----

Follow these steps to set an indefinite due date:

1. Activate the **Open CKO Window** process.
   Circulation opens the Checkout window.

2. Identify the borrower.
   Horizon displays the borrower’s name in the Checkout window.

3. Identify the item.

4. Highlight the item in the list box.

5. Click **Edit Item**.
   Horizon displays the **Edit Checkout** window.

6. Enter any date beyond 12-31-2049 in the **Due Date** field.

7. Click **Save**.

8. Click **Close**.
   Horizon displays the due date listed as Indefinite Loan.
Checkin

You can check in items as part of a morning routine, or as an ongoing task throughout the day. A standard checkin involves scanning or entering the item barcode. There may be times, however, when something else is needed. You may need to exempt fines or change the checkin date.

This section explains these topics:

• Checking in items
• Checkin in an item under special conditions
• Checking in a damaged item
• Editing item information in Checkin
• Changing the Checkin date and time
• Restarting the clock
Checking In Items

When you check in an item in Standard Checkin mode (the system default setting) Circulation does these things:

- Checks to see if the item is overdue and imposes the correct fine, if necessary.
- Changes the item’s status to “Shelving Cart,” indicating that the item has been checked in but is not yet on the shelf. Your system administrator determines how long an item remains on “Shelving Cart” status as part of library policy. When borrowers search for the item, they will know the item has been checked in recently and is on the shelving cart.
- Records in the borrower record that the item has been checked in.
- Prompts you if the item has been recalled, requested, or is in transit from another location.
- When you try to check in an item that is not currently checked out, Horizon displays a message. If you do not want to display this message, choose CKI, Hide ‘Item Not Out’ message. If you want all items to display in the window after you enter their barcode in the Checkin/Request Processing window even if they were not checked out, choose CKI, Always Put in List.

You do not need to identify a borrower when you check in items. If you want to, however, you can display the borrower who checked out the item when you check it in by choosing Show Borrower from the CKI menu.

The Display Borrower option also affects the list view in the Checkin/Request Processing window. When Horizon does not display the borrower, the Checkin/Request Processing window displays a list of all items checked in. When you choose to show the borrower, the borrower’s name displays to the right of the Barcode field and items in the list view relate to that borrower.

Horizon clears the list view to display items checked in from a new borrower. If the borrower checking in the item has blocks, Horizon displays the Current Blocks window, displaying the blocks for that borrower.

If you choose Show Borrower from the CKI menu, the current blocks on a borrower will only show the first time you check in an item the borrower has used during a checkin session. After the first display of the Current Block window in Checkin, you need to click Current Blocks to show any blocks the borrower has.
Follow these steps to check in an item:

1. Activate the **Open CKI Window** process.

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

   Circulation opens the Checkin/Request Processing window:

   ![Checkin/Request Processing Window](image)

   By default, Horizon opens in Standard Checkin mode. Notice the various radio buttons across the top of the Checkin window. These “Special Condition” modes (which includes Damaged Checkin mode) are discussed later in this chapter.

2. Do one of these options:
   - Scan the item’s barcode label.
   - Enter the item’s barcode number in the Barcode field and click **OK**.

   If the barcode is missing or will not read, you may have to search for the item so that you can get the item barcode from its computer record.
Horizon checks in the item, relaying an audible signal and displaying the title and other information in the list box. This information includes the status “Shelving Cart.” Here is an example of the checkin window:

If you chose CKI, Show Borrower, Horizon displays the borrower’s name on the Checkin/Request Processing window.

If you use a security system such as 3M or CheckPoint, be sure to reset the security on each item before you put it on the shelving cart.
Checkin under Special Conditions

You can check in items under these special conditions:

- **Bookdrop.** This mode checks in items with a due date that corresponds to the last open day.
  (For example, suppose a borrower drops off a book on Saturday and your library is closed on Sunday. If you check in the book on Monday, you can use Bookdrop mode to record the checkin date as Saturday—the day the borrower dropped off the book.) When you mark the Bookdrop button, the date changes to be the previous open date and the time changes to 1 minute prior to the closing time of that date.

- **In-House Use.** This mode records item use statistics for non-circulating or other items that are used within the library but not checked out. When you check the item in, Horizon records that the item has been used and displays the item’s status as if you had checked in an item that had been checked out.

- **Exempt Fines.** This mode exempts the borrower from any fines associated with the items being checked in if they are overdue.

- **Renewal.** This mode lets you renew an item already checked out to a borrower. Using the current date, this mode resets the items due date, based on the circulation rules for that item type.

To check in an item under these conditions, you must first change the checkin mode.

**Follow these steps to check in items under special conditions:**

1. Activate the **Open CKI Window** process.
   Circulation opens the Checkin/Request Processing window.

2. Mark the button for the mode that you want to use.
   If you want to turn off a checkin mode, deselect the button next to the mode you want to stop using or mark another mode button. You can also access the special condition Checkin modes from the CKI menu.

3. Continue with the checkin process.

4. When you finish checking in items under special conditions, deselect the button to return to normal checkin mode.
Checking in a Damaged Item

Occasionally, you may check in an item that is damaged and want to prevent the damaged item from circulating. By using the damaged check-in mode, you make the item unavailable for these actions, even if the item has already been identified for use by one of the actions:

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

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

Your system administrator can set up the Damaged Checkin mode to automatically display the name of the borrower during checkin.

Follow these steps to check in a damaged item:

1. With the damaged item in hand, enter damaged checkin mode by selecting CKI, Damaged Mode. Horizon displays “Damaged Checkin Mode” in red on the Checkin screen:
2. Check in the item in Damaged Checkin mode.

The item appears in the status information pane with a notation of “damaged.” If the Show Borrower option is enabled, Horizon displays the borrower’s name next to the Barcode field. If the Show Borrower option is not enabled, you will have to highlight the item you just checked in and click **Edit Item** to see borrower information.

---

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

---

Horizon does not automatically assess fees to damaged items from Checkin. You must assess fees from Checkout.

3. Press **F8** to toggle to Checkout.

4. Select **Blocks, Add Fee** to add a fee to the borrower’s record for the damaged item:
5. Select a block type from the list.

The Add Fee window appears:

6. Enter the fee (fine) amount you are assessing.
In the Comments field, scan in the damaged item’s barcode. Enter the damaged item’s title as well. This way, you have a record of why the block was created and how it is associated with the item.

7. If you want this block to print as a notice to the borrower, make sure you select the Print radio button.

8. Click OK to save the fee block and associated comments.

9. Return to Checkin and access CKI, Damaged Mode to deselect Damaged mode and toggle Checkin to Standard Checkin mode.
Editing Item Information in Checkin

Once you have checked in an item, you can view and edit the item’s circulation information from Checkin/Request Processing.

Follow these steps to edit item information in Checkin:

1. Activate the Open CKI Window process.
   Circulation opens the Checkin/Request Processing window.
2. Check in the item.
3. Highlight the item in the list box.
4. Click Edit Item.

Horizon displays the Edit Checking/Request Processing window:

5. Edit the item’s circulation information:
   • Notes. Enter any information about the item.
     The text you enter in this field appears in the list box of the Checkin/Request Processing window with the item.
   • Barcode. Edit the item’s barcode.
     (Item barcodes are usually edited in Cataloging.)
   • Collection. Edit the collection for the item.
     Click Codes to display a list of valid options.
• **Internal Note.** Enter any comments about the item to be viewed by library staff.

6. When you finish editing the item information, click **Save**.
7. Click **Close**.
Changing the Checkin Date and Time

Horizon uses the current date from your computer operating system as the date an item is checked in. You may need to change the checkin date to a date other than the current one. (For example, you may have too many items to check in before the closing of the day. The next day, by temporarily changing the current date to the previous one, you can check in the items under the date you received them, and then restore the date to the current date.)

Marking the Bookdrop checkin mode in the Checkin/Request Processing window automatically changes the date to the previous day the library was open. Turning Bookdrop mode off restarts the clock and sets the date to the current date.

Follow these steps to change the checkin date and time:

1. Activate the Open CKI Window process.
   Circulation opens the Checkin/Request Processing window.

2. Click Change CKI Date.
   Horizon displays the Change Checkin Date & Time dialog box:

3. Enter the checkin date and time you want to use.
   Be sure to mark the appropriate AM or PM button.

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

5. Continue with “Restarting the Clock,” the next task in this manual.
Restarting the Clock

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

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

Follow these steps to restart the clock:

1. Activate the **Open CKI Window** process.
   Circulation opens the Checkin/Request Processing window.

2. Click **Change CKI Date**.
   Horizon displays the Change Checkin Date & Time dialog box:

   ![Change Checkin Date & Time dialog box](image)

3. Click **Restart Clock**.
   Horizon displays the current date and time at the top-right corner of the Checkin/Request Processing window.
Searching for an Item in Checkout or Checkin

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

Follow these steps to search for an item in Checkout or Checkin:

1. Activate the Open CKI Window or Open CKO Window process.

2. If you are checking out an item, identify the borrower.
   Horizon displays the borrower’s name in the Checkout window.

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

4. Search for the item until the title appears in the Bibliographic Detail window.
   The item’s status shows at the top of the window.

   If the status of the item is something other than “Checked In” and the item is present, you can still check it out by completing the remaining steps. If the item is not present, you can place a request for the item.

5. Click Show Copies.
   Horizon displays the title in the Copies window.

6. Press F10 or choose Edit, Send to.
   Horizon displays the Send To dialog box.

7. Double-click the process to which you want to send the record.
   Horizon displays the title’s barcode number in the barcode field of the Checkout or Checkin/Request Processing window.

8. Click OK.
   Circulation checks out or checks in the title and displays it in the list box.
Viewing In-House Use Information for an Item

You can keep track of individual item use statistics for non-circulating items or other items that are used within the library but not checked out.

When you check in an item using the in-house mode, Circulation displays the item’s total number of in-house uses and the date of the item’s last in-house use. Additionally, you can print this information by creating an in-house use report.

If you use a circulation tool such as PC Reliance or 3M Automated Circulation System to check in items, the in-house mode is not available. Horizon cannot compute in-house use statistics if you do not use Horizon Circulation.

Follow these steps to view in-house use information for an item:

1. Check in an item using in-house mode.

   Horizon records that the item has been used and displays the item’s status as if you had checked in an item that had been checked out.

2. Double-click the item whose in-house statistics you want to view.

   Horizon displays the Edit Checkin/Request Processing window.

3. Click Page Down or resize the window until you find the in-house use statistics:

   ![Edit Checkin/Request Processing window]

4. Click Close to exit the Edit Checkin window.
5. Repeat steps 1 through 4 for each item whose in-house use statistics you want to view.

Items continue to check in the In-House mode until you change to another mode or until you close Circulation.
Printing Circulation Receipts and Workslips

Horizon lets you attach a printer to the terminals at your circulation desk to print receipts and workslips. The Circulation Slip Printer prints two types of slips: receipts and workslips. Your system administrator determines which receipts and workslips print automatically at each workstation. You can print all receipts automatically except group checkin or group checkout receipts.

Receipts

You can print receipts to help borrowers keep track of their library transactions, such as items they have checked out or fines they have paid.

Receipts include the following types:

- **Due date slip.** The due date slip is a single-item receipt that lists one item checked out and its due date. This receipt prints individually at checkout as you enter each barcode.

- **Checkout.** The checkout receipt is a multi-item receipt that lists all items checked out, their due date, and the total number of items checked out to a borrower for the current transaction. You print this receipt by pressing F11 after scanning in the last barcode.

- **Checkin Group.** The checkin group receipt is a multi-item receipt that lists all items checked in by a borrower and the date. You can print this receipt by pressing F11 after scanning in the last barcode.

- **Single checkin receipt.** The checkin single receipt is a single-item receipt that lists one item checked in and the date. You print this receipt individually at checkin as you enter each barcode.

- **Patron payment receipt.** The payment receipt lists the amount a borrower paid for an overdue item or other library fee.

- **Patron refund receipt.** The refund receipt lists the amount a borrower receives as a refund.

- **Renewal receipt.** The renewal receipt is a multi-item receipt that lists all items a borrower renewed, the original due date, the new due date, and the total number of items renewed.

Choose Tools, Change Receipt Options to display the Workstation Receipt Options window when Open CKI Window or Open CKO Window is active. You must mark the Allow Printing of Slips and Receipts box for any slips to print or for the hot keys—F11 and F12—to work. Check with your system administrator before making any changes.
Here is a sample due date slip:

<table>
<thead>
<tr>
<th>Due Date Slip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Francis-Davis Research Library</td>
</tr>
<tr>
<td>Main Circulation 7</td>
</tr>
<tr>
<td>10-12-95 10:29</td>
</tr>
<tr>
<td>^^^^^^^^^^^^^^^^^^^</td>
</tr>
<tr>
<td>Patron: 10005466342346</td>
</tr>
<tr>
<td>Item: 330320005 Date: 10-26-95</td>
</tr>
<tr>
<td>Vitamins and Your Body</td>
</tr>
<tr>
<td>ref ml/ZIC1,1’1:1</td>
</tr>
<tr>
<td>CALL NO. KF1297.D7 D8</td>
</tr>
<tr>
<td>Return to the Health Desk</td>
</tr>
<tr>
<td>Please Keep Slip With Book</td>
</tr>
</tbody>
</table>

If you change an item’s due date, Circulation prints the item receipt as soon as you enter the barcode, and prints a renewal receipt when you change the date.

**WORKSLIPS**

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

Workslips include these types:

- **Needs Cataloging.** The Needs Cataloging workslip notifies staff that the item needs cataloging.
- **In Transit.** The In Transit workslip notifies staff that the item needs to be sent to the library location specified.
- **Hold.** The Hold workslip notifies staff that the item has a hold placed on it and needs to be placed on the hold shelf. The name, barcode, phone, and e-mail address of the borrower who placed the hold may also be printed on the receipt.
Here is a sample workslip:

Route to Cataloging
Francis-Davis Research Library
Main Circulation 7
10-12-97 10:29

**************************

Item: 3281500695
The Middle Ages
bkk

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

1.
2.
3.
4.
5.
6.
Chapter Four

Blocks

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

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

There are two general categories of blocks:

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

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

- **Library-defined blocks.** You place these blocks manually on a borrower’s record. These blocks may include messages to borrowers or fees owed other than overdue fines.

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

Your system administrator specifies, in the Block table, the sort priority order for block types. Blocks given a priority of “0” will sort to the front of the list; other blocks list after blocks given a priority setting. For example, if you want Lost blocks to appear at the top of the list, you could give Lost blocks a sort priority of “0” so they would display at the top of a borrower’s current block screen.
Blocks on Borrowers

Some blocks that the system generates automatically are based on limits that your system administrator sets for your borrowers. For example, you typically encounter borrower limits on:

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

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

Horizon comes with a set of predefined blocks. You cannot delete these system-defined blocks, but you can edit some of the parameters. Parameters you can edit include time periods, actions taken, and messages.

We’ve provided a table, at the end of this chapter, listing the system generated blocks that come installed in Horizon.
Viewing Block Information

If you need to view information about a borrower’s blocks, you can display the Current Blocks window from either the Checkin/Request Processing window or the Checkout window:

These are the display fields in the Current Blocks window:

- **Borrower.** The name of the borrower whose record you are viewing.
- **Overdues.** The number of overdue items the borrower currently has checked out.
- **Amt. Due.** The total amount of fines the borrower has accrued.
- **Overdue Accrued Amt.** The amount the borrower would owe if all overdue items were checked in today. This potential amount is not included in the total amount owed, since the item is not yet returned. (For example, once you check in an overdue item, the overdue block is removed and the overdue amount for that item accrues and is now included in the total amount.)
- **Blocks.** The total number of blocks against the borrower’s record.

These are the buttons on the Current Blocks window:

- **Detail.** Displays details of a single highlighted block.
- **CKO.** Overrides any blocks and displays the borrower in the Checkout window for checkout procedures.
- **Close.** Closes the Current Blocks window.
- **Payment.** Lets you transact a payment for the fine if the borrower owes a fine.
- **History.** Displays the History Blocks window for the borrower, where you can view or edit comments about past blocks.
• **Change Amount.** Displays a window where you can change the amount owed for a selected fine or fee block.

This section explains these topics:

• Viewing a list of outstanding blocks from Checkout
• Viewing a list of outstanding blocks from Checkin
• Viewing block information by item barcode
• Using the Show Borrower option in Checkin
• Viewing a borrower’s block history
• Viewing block details

**VIEWING A LIST OF OUTSTANDING BLOCKS FROM CHECKOUT**

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

• **Automatically.** If a borrower has blocks when you enter his or her ID in the Checkout window, Circulation makes an audible signal and displays the Current Blocks window.

• **Manually.** If you have already identified a borrower who has blocks and have overridden the Current Blocks window when it is displayed, you can click Blocks at the bottom of the Checkout window to redisplay the current blocks.

**VIEWING A LIST OF OUTSTANDING BLOCKS FROM CHECKIN**

Circulation does not automatically display a list of the borrower’s outstanding blocks when you check in an item. This is because no action is usually required on your part at the checkin time. However, you can choose to have the blocks display automatically by marking Show Borrower in the CKI menu.

If the Show Borrower Menu item is not marked, or if you close the Current Blocks window and then want to display it again, you can also display the Current Blocks window for a borrower from the Checkin/Request Processing window.

Follow these steps to view a list of outstanding blocks from Checkin:

1. **Activate the Open CKI Window process.**
   Circulation opens the Checkin/Request Processing window.

2. **Check in an item.**
   Horizon checks in the item and enables the **Show Blocks** button at the bottom of the window.

3. **Click Show Blocks.**
   Horizon displays the Current Blocks window for the borrower who had the item checked out.
4. Click Close.

Horizon returns to the Checkin/Request Processing window.

**VIEWING BLOCK INFORMATION**

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

You have several options when displaying blocks. You access these options from the Blocks menu:

- **Sort by Item.** Displays information first by barcode and then by date. (For example, overdue notices, fines, and a fine payment on a single item are grouped together, even though they are different block types.) This grouping gives you an overview of all block actions against the item.
- **Sort by Date.** Displays information first by date and then by time.
- **Group All Related.** Displays related blocks together. For example, a Lost item block and its associated Lost processing fee would be grouped and displayed as a single block (instead of separate entries in the Blocks List window).

Information will sort by item barcode until you deselect the Sort by Item menu option or until you close Circulation.

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

1. Open the Current Blocks or History Blocks window.
2. Choose **Blocks, Sort by Item** (or **Sort by Date** or **Group All Related**, as applicable):

   ![Current Blocks window](image)

   Circulation sorts the information and displays it in order by barcode.

**Using the Show Borrower Option in Checkin**

You can choose to display the name of the borrower who checked out the item you are checking in by selecting **Show Borrower** from the CKI menu. This option also affects the list view in the CKI window. When you choose to show the borrower’s name, the name appears to the right of the barcode window and items in the list view relate to the borrower shown. When you check in an item checked out by a different borrower, Horizon clears the list view to display items checked in from the new borrower. If the item you check in was being used by a borrower with blocks, the Current Blocks window displays, showing the blocks for that borrower.

If you select **Show Borrower** from the CKI menu, the current blocks on a borrower will only show the first time you check in an item the borrower has used during a checkin session. After the first display of the Current Block window in Checkin, you need to click Current Blocks to show any blocks the borrower has.
Follow these steps to use the Show Borrower Option in CKI:

1. Activate the **Open CKI Window** process.
   
   Circulation opens the Checkin/Request Processing window.

2. Choose **CKI, Show Borrower**.
   
   Horizon places a check mark on the menu beside the Show Borrower option.

3. If you want to, you can choose CKI again to verify that the check mark appears.

   When you check in materials, the borrower’s name appears beside the barcode window.
Viewing a Borrower’s Block History

If you need to review past blocks that a borrower has already resolved, you can open a borrower’s History Blocks window.

This window contains the following information:

- The name of the borrower.
- A list box of all blocks for that borrower with the dates they were issued.
- The total number of blocks that borrower has accumulated.
- You can access the History Blocks window from the Current Blocks window or from the Borrower menu.

Follow these steps to view a borrower’s block history from the Current Blocks window:

1. Display the Current Blocks window.
2. Click History.
   Horizon displays the History Blocks window:

3. If you want to display details about a block on the History file, highlight the block and click Close.
   Horizon returns to the Current Blocks window.
Follow these steps to view a borrower’s block history from the Borrower menu:

1. Activate the Open CKO Window process.
   Circulation opens the Checkout window.

2. Identify the borrower.

3. Choose **Borrower, History Blocks**.
   Horizon displays the History Blocks window.

4. If you want to display details about a block on the History file, highlight the block and click **Detail**.

5. Click **Close**.
   Horizon returns to the Current Blocks window.
Viewing Block Details

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

The window also displays this information:

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

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

Follow these steps to view block details:

1. Display the Current Blocks or History Blocks window.
2. Highlight the block with the detail you want to view.
3. Click Detail.

Horizon displays the Block Detail window:

![Block Detail Window]

From this window you can place a comment about the block or delete the block.
4. Click **Close**.

   Horizon returns to the Current Blocks window.
Resolving System-Defined Blocks

Some system-defined blocks are resolved automatically by Horizon in the normal course of business. You can also resolve many blocks by manually intervening, or by telling the system what you want to have happen at a given time.

**RESOLVING BLOCKS AUTOMATICALLY**

Most blocks are resolved automatically by Horizon. (For example, when an overdue item is checked in, Horizon removes the overdue block.)

This table explains how to resolve the more common system-assigned blocks:

<table>
<thead>
<tr>
<th>To resolve this block</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overdue</td>
<td>Check in the item.</td>
</tr>
<tr>
<td>Fine</td>
<td>Pay the fine (or waive it).</td>
</tr>
<tr>
<td>Lost</td>
<td>Pay any lost fee, or change the item to “Claimed Returned.”</td>
</tr>
<tr>
<td>Missing</td>
<td>Check in the item.</td>
</tr>
<tr>
<td>Recalled</td>
<td>Check in the item.</td>
</tr>
</tbody>
</table>

**RESOLVING BLOCKS MANUALLY**

In this section you’ll learn how to manually resolve a couple of different types of blocks. First, you’ll learn to waive fines for a borrower. Next, you’ll learn how to manually delete a block.

**WAIVING A FINE FOR A BORROWER**

The time to exempt a borrower from fines calculation is when he or she checks in overdue items. If you do not exempt the borrower at this time, fines accrue and must be waived at a later date.

**Follow these steps to waive a fine for a borrower:**

1. Activate the **Open CKI Window** process.
   Circulation opens the Checkin/Request Processing window.

2. Mark the **Exempt Fines** button.
   All items checked in while this button is marked are exempt from fines calculation.

3. Check in the items that should be exempted from fines.

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

**Manually Deleting a Block**

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

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

**Follow these steps to manually delete a block:**

1. Activate the **Open CKO Window** process.
   
   Circulation opens the Checkout window.

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

3. Highlight the blocks you want to delete.

4. Choose **Blocks, Delete**.
   
   Horizon asks you to confirm the deletion:

   ![Are you sure?](image)

5. Click **OK**.
   
   Horizon deletes the blocks.

6. Click **Close**.
Manually Placing a Block

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

This section explains these topics:

- Placing a note block
- Placing a fee block
- Placing a Claimed Return or Lost Item block
- Adding a comment to a block

Placing a Note Block

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

Follow these steps to place a note block:

1. Activate the Open CKO Window process.
   Circulation opens the Checkout window.
2. Identify the borrower.
3. Choose Blocks, Add Note.
4. If Horizon displays the Edit Current Blocks window, go to step 6.
5. If Horizon displays the Code Look-up Block Types window, double-click on the note block type you want to add:

   ![Code Lookup: Block Types](image)

   Horizon displays the Edit Current Blocks window:
6. Mark the appropriate Action button.

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

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

7. If you want to, enter a comment about the note block in the Comment field. Horizon displays this note in the blocks window.

8. Click OK.

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

9. Click Close.

Horizon returns to the Checkout window with the borrower’s name displayed ready for checkout.

**Placing a Fee Block**

Your system administrator can create fee blocks for fees such as interlibrary loans, photocopy fees, and library card issuance fees. You can manually add these fees to a borrower’s current blocks.
Placing a Claimed Return or Lost Item Block

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

Follow these steps to place a claimed return or lost item block:

1. Activate the Open CKO Window process.
   Circulation opens the Checkout window.

2. Identify the borrower.

3. If Horizon does not open the Current Blocks window, click Current Blocks.

4. Click CKO.
   Horizon displays the Checkout window with the borrower’s name displayed at the top.

5. Click All Items Out.
   Horizon lists all items currently checked out to the borrower:

6. Highlight the overdue title.

7. Choose CKO, Claimed Return or CKO, Lost.
   Horizon assigns a “Claimed Return” or “Lost” status to the item, depending on the one you chose.
Adding a Comment to a Block

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

Follow these steps to add a comment to a block:

1. Activate the **Open CKO Window** process.
   Circulation opens the Checkout window.

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

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

4. Click **Detail**.
   Horizon displays the Block Detail window for that block.

5. Click **Comment**.
   Horizon displays the Edit Block Detail window.

6. Enter your note in the Comment field.

7. Mark the appropriate **Action** button.

8. Click **Close**.
   Horizon returns to the Block Detail window and displays the new comment.
Fines and Payment Transactions

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

You perform four main functions when transacting fines:

- **Assess Fees.** These are amounts charged to borrowers either automatically or manually. These amounts can include fines for overdue and lost items and fees for services rendered.

- **Transact Payments, Waivers, and Refunds.** These are amounts credited or debited by the borrower.

- **Print and Send Bills.** These are invoices or notices sent to the borrowers to inform and remind them of payments due.

- **View and Print Reports.** These are detailed reports that track fees and payments.
**Fees**

Fees are calculated in one of two ways:

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

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

Although you do not levy overdue and lost fines as you would library-defined fees, you do transact payments for system-generated fines the same way you would for manually added fees.

This section explains these topics:

- Adding a library-defined fee
- Changing a fee amount
- Viewing a list of calculated fines and potential fines

### Adding a Library-Defined Fee

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

Each fee-type block can have a sales tax amount attached to it, such as ten percent or six percent. If the block has no sales tax attached or, if the borrower’s Btype is exempt from sales tax, no sales tax will be calculated.

**Follow these steps to add a library-defined fee:**

1. Activate the **Open CKO Window** process.
   Circulation opens the Checkout window.
2. Identify the borrower.

Horizon displays either the Checkout window or the Current Blocks window, if the borrower has other blocks.

3. Choose Blocks, Add Fee.

4. If Horizon displays the Add Fee window, go to step 6.

5. If Horizon displays the Block Types window, double-click on the fee block you want to add.

Horizon displays the Add Fee window:

6. Enter or verify the amount in the Amount field. (Enter it in this format: NN.NN)

7. Mark the appropriate Action button.

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

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

8. Enter any comments about the fee.

9. Click OK.

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

10. Click Close.
CHANGING A FEE AMOUNT

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

Follow these steps to change a fee amount:

1. Activate the Open CKO Window process.

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

   Circulation opens the Checkout window.

2. Identify the borrower.

   Horizon displays the Current Blocks window for the borrower.

3. Highlight the fee block with the amount you want to change.

4. Click Change Amt.

   Horizon displays the Change Fee Amount window:

   ![Change Fee Amount window]

5. In the Change to field, enter a new amount.

   Entering zero resolves the block.

6. Enter a reason for changing the amount.

7. Click OK.

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

**VIEWING A LIST OF CALCULATED FINES AND POTENTIAL FINES**

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

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

You can view “as of today” fines by opening the borrower’s Current Blocks window.

All “as of today” fines appear in a different color from other fees:

- **Total amount due.**
  - Does not include “as of today” fines.
- **“As of Today” amount.**
Payments, Waivers, and Refunds

Circulation can accept and track payments, waivers, and refunds. Each time a payment, waiver, refund, or change in amount due is made, Circulation adds an entry to the payment transaction log. Check with your system administrator about accessing the transaction log.

This section explains these topics:

- Transacting a payment or waiver
- Transacting a refund
- Viewing payment history

Transacting a Payment or Waiver

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

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

Follow these steps to transact a payment or waiver:

1. Activate the Open CKO Window process.
   Circulation opens the Checkout window.

2. Identify the borrower.
   Horizon displays the borrower’s Current Blocks window.

3. Highlight the fine block to which you want to apply the payment, waiver, or refund.

4. Choose one of these options:
   - Blocks, Payment.
   - Blocks, Waiver.

5. If Horizon displays either the Fine Payment window or the Waiver of Fine window, skip to Step 7.

6. If Horizon displays a fine category list, double-click on the block category you want to add.
Horizon displays the Fine Payment window:

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

If you have chosen to print payment receipts in the Change Receipt Options window for the Circulation Slip Printer, the check box is already checked for you.

11. Click **OK**.

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

12. Click **Close**.

**TRANSACTING A REFUND**

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

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

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

When the item (previously reported as lost) is checked in, Horizon displays this message:

![Lost Item Found Message]

Horizon modifies the borrower’s blocks and credits him for the lost item fee.

---

**You can also assess processing fees for lost items to defray the costs of reordering. This is useful when the library has incurred expenses in the process of reordering the lost item.**

---

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

![Current Blocks Window]

To refund the payment, select the block showing the negative amount, then choose Blocks, Refund.

When you select a block showing a negative amount, specify a refund category and enter the amount. Horizon records the transaction in the payment log. This lets you account for the $35.00 you paid out.
Two unique situations may pose a problem in balancing the cash drawer and accounting for the missing money:

- The amount being refunded no longer appears on the borrower’s list of current blocks.
  For example, if a borrower paid for the lost book a while ago and only found it after the payment block was purged from the borrower’s block history, no negative amount exists in the Current Blocks list for you to select. That negative amount must appear in the list before you can refund the amount.

- The amount being refunded does not need to be recorded in the borrower’s record yet needs to be accounted for in the cash drawer.
  For example, suppose a borrower’s money gets “eaten” by the library copy machine. You need to refund the money and account for it in the cash drawer, but also keep the transaction off the borrower’s record. To do this, create a pseudo borrower record for the copy machine. You would then assign a fee type to the copy machine, enter a negative amount, and then refund the amount to the borrower.

Follow these steps to refund an existing negative amount:

1. Activate the **Open CKO Window** process.
   Circulation opens the Checkout window.

2. Identify the borrower.
   Horizon displays the borrower’s Current Blocks window:

3. Enter the amount you want to refund.
The amount must be a negative, such as -10.00 or -00.50.

4. Choose Blocks, Refund.

5. If Horizon displays a Refund of Payment window, go to step 7.

6. If Horizon displays a list of refund categories, double-click on the block category you want.

7. Enter or verify the amount being refunded.

8. Enter any comments.

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

If you choose to print payment receipts in the Change Receipt Options window for Circulation Slip Printer, the box is already checked for you.

10. Click OK.

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

11. Click Close.

Follow these steps to refund a non-existing negative amount:

1. Activate the Open CKO Window process.

   Circulation opens the Checkout window.

2. Identify the borrower.

   Horizon displays the Current Blocks window.

   If the “borrower” is a machine for which you are refunding lost monies, you must first set up a borrower record for the machine.

3. Choose Blocks, Add Fee.

4. If Horizon displays a window, go to step 6.
5. If Horizon displays a list of fee block categories, double-click on the category you want to add.
   Horizon displays a window.

6. Enter, in negative numbers, the amount you need to refund.

7. Enter any comments.

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

9. Highlight the negative amount you just added.

10. Choose Blocks, Refund.

11. Double-click on the block category you want to add.

12. Horizon displays a window with a list of refund categories.

13. Enter or verify the amount being refunded.

14. Enter any comments.

15. Mark the Print Receipt box if you use the Circulation Slip Printer Feature to print a receipt.

   If you choose to print payment receipts in the Change Receipt Options window for Circulation Slip Printer, the box is already marked for you.

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

17. Click Close.

**VIEWING PAYMENT HISTORY**

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

**Follow these steps to view payment history:**

1. Activate the Open CKO Window process.
   Circulation opens the Checkout window.
2. Identify the borrower.

3. If Horizon displays the Current Blocks window, click **CKO**.
   Horizon displays the Checkout window with the borrower’s name.

4. Choose **Borrower, Payment History**.
   Horizon displays a window in which you can enter a date after which you want to view all payment transactions.

5. Enter the date in the field.

6. Chose **OK**.
   Horizon displays the Payment History window:

   ![Payment History window](image)

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

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

8. When you have finished viewing the borrower’s payment history, click **Close**.
Bills

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

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

If your library chooses to notify borrowers by phone or by e-mail, check with your system administrator for instructions. Your system administrator also determines the type and frequency of printed notices and invoices. Whether a borrower is sent a notice or an invoice is determined by the borrower’s Btype. The Btype contains a flag for sending either notices or invoices.
Cash Transaction Reports

Horizon tracks cash transactions performed in Circulation, such as fine payments and refunds, and stores them in a view. You can extract information from the view using a third-party report generator and then print reports.

Horizon tracks this information in the fee payment transaction log:

- **Who performed the transaction.** This is determined by the user ID and password of the person who logged on to Circulation.
- **What the transaction was.** This is determined by the fee block type chosen when the transaction occurred.
- **When the transaction occurred.** This is determined by the computer’s operating system date.
- **Which workstation and location the transaction took place at.** This is determined by the workstation ID and location ID specified at the workstation.
- **The cash drawer the cash was put into or taken from.** This is determined by the cash drawer ID specified at the workstation.
# System Generated Blocks in Horizon

<table>
<thead>
<tr>
<th>Block Name</th>
<th>Block Code</th>
<th>Block Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic Bill Sent</td>
<td>abs</td>
<td>This block triggers Day End to generate a billing statement. When the statement is generated, Circulation attaches an Automatic Bill Sent block to each of the fine or lost blocks that have amounts included on the billing notice.</td>
</tr>
<tr>
<td>Address Correction Requested</td>
<td>acr</td>
<td>If you are aware that a borrower’s address has changed, you can place this block on the borrower’s record. The next time the borrower checks out an item, you can update the borrower’s record.</td>
</tr>
<tr>
<td>Adjustment Credit</td>
<td>adjcr</td>
<td>When a staff member decreases the amount a borrower owes on an existing fine or fee, Circulation attaches an Adjustment Credit block to the borrower’s record. This block tracks the date and the amount adjusted.</td>
</tr>
<tr>
<td>Adjustment Debit</td>
<td>adjdbt</td>
<td>When a staff member increases the amount a borrower owes on an existing fine or fee, Circulation attaches an Adjustment Debit block to the borrower’s record. This block tracks the date and amount adjusted.</td>
</tr>
<tr>
<td>Balancing Entry</td>
<td>balance</td>
<td>Circulation places this block as a notation appended to the original fine block.</td>
</tr>
<tr>
<td>Billing Notice</td>
<td>bn</td>
<td>Circulation places this block when Day End is run. Day End will generate a billing statement because the borrower has new fines that exceed a library-determined limit. (For information on setting a fine limit, see your system administrator.)</td>
</tr>
</tbody>
</table>
| Booking Cancelled: Expired, Library, Tardy, By Borrower, By Suspension | bce, bel, bct, bcbr, bbsp | Each of these blocks is attached to borrowers’ records when their bookings are cancelled. Each block identifies the reason the booking was cancelled:  
- **Expired**. The booking period passed without the borrower checking out the booked item.  
- **Library**. A staff member cancelled the booking.  
- **Tardy**. The holding period for the booking period passed and the item was not picked up. The item was checked out to someone else.  
- **By Borrower**. The borrower no longer needs the item and has cancelled the booking.  
- **By Suspension**. The borrower is no longer an active user of the system. |
Claimed Return: You can manually change the Overdue block to a Claimed Return block when a borrower claims that an overdue item has been returned. The Claimed Return block does not exempt the borrower from responsibility for the item, but it does alert the library to take the necessary steps to check if the book is in the library. When you use this block, you should access it directly from the CKO menu.

Credit: This block is placed when an amount is credited to the borrower’s account.

Damaged: When a borrower returns an item in a damaged state, you can manually attach this block to the borrower’s record. If you want a fine levied for repairs, mark the “Payment” Amount Type option.

Debt Collection: Horizon places this block when a borrower’s name has been sent to a collection agency.

Exempt from Debt Collection: Horizon places this block if a borrower whose name ordinarily would be sent to a collection agency will not be sent.

Force to Debt Collection: Horizon places this block when a patron’s name is forced to a collection agency.

Fees: This block is not used by all libraries. It is usually set to charge a card or membership fee. It can also be used to note miscellaneous fees, such as copy machine use. This block should not be used to enter overdue fines.

Fine: When an overdue item is checked in, the Overdue Still Out block is replaced by a Fine block. The Fine block checks the due date and checkin date, accounts for any grace period, and computes the fine according to the ITYPE and BTYPE. (For more information on setting ITYPEs, BTYPEs, and grace periods, check with your system administrator.)

Your library can create additional fine blocks that are attached manually.

Found: When a lost item is checked in, Circulation sets a Found block on the borrower’s record. If a fine has been paid for the lost item, Circulation also generates a Refund of Payment block for the borrower.
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</tr>
</tbody>
</table>
| Hold Cancelled: By Library, By Borrower        | hel, hcb   | • **By Library.** If a staff member cancels a hold placed by a borrower, Circulation places this type of block on the borrower’s record so there is a record of why and when the block was cancelled.  
• **By Borrower.** If a borrower cancels a hold, Circulation places this type of block on the borrower’s record so there is a record of why and when the block was cancelled. |
| Hold Cancelled and Reinserted in Queue         | hclr       | When a staff member checks out an item on hold to a different borrower, Horizon allows the option of reinserting the original request in the request queue. If a staff member chooses to reinsert the request, Circulation generates this block and places it on the borrower record of the original borrower. |
| Hold Expired                                   | he         | If an item remains on hold for a specified amount of time and is not picked up by the requestor, then Horizon automatically cancels the hold. The time required between the time the item is checked in and the time the hold is cancelled is determined by library policy and set by your system administrator. |
| Hold Notification: Deliver, Mail, Phone, From Closed Stack | hnnko, hnmail, hnnphone, hncsa | • **Deliver.** Horizon places this block on a borrower’s record when a hold notification for delivery has been generated. The block keeps track of what action has been taken regarding the hold.  
• **Mail.** Horizon places this block when a hold notification for mailing has been generated. The block keeps track of what action has been taken regarding the hold.  
• **Phone.** Horizon places this block when a notice has been generated to perform a hold notification by phone. The block keeps track of what action has been taken regarding the hold.  
• **From Closed Stack.** Horizon places this block when a notice has been generated to tell a borrower that items from closed stacks are ready for the borrower to use. |
<p>| Invoice                                        | in         | Your library has the option to notify borrowers of fines owed with either a billing notice or an invoice. If an invoice is generated for a borrower, this block is attached to the borrower’s record automatically. |</p>
<table>
<thead>
<tr>
<th>Block Name</th>
<th>Block Code</th>
<th>Block Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic Bill Sent</td>
<td>abs</td>
<td>This block triggers Day End to generate a billing statement. When the statement is generated, Circulation attaches an Automatic Bill Sent block to each of the fine or lost blocks that have amounts included on the billing notice.</td>
</tr>
<tr>
<td>Information about Checkin Date, Checkout Date, Due Date, Renewal Date, Checkin Location</td>
<td>infocki, infocko, infodue, inforeen, infocil</td>
<td>Circulation creates these blocks to record information about transactions: checkin, checkout, due date, renewal, or location.</td>
</tr>
<tr>
<td>Message to Borrower</td>
<td>msg</td>
<td>If a borrower has a situation that the regular system blocks do not fit, you can place your own message block on the borrower’s record. Messages describe or clarify unusual circumstances and exceptions to library policies.</td>
</tr>
<tr>
<td>Lost</td>
<td>1</td>
<td>This type of block is similar to a Claimed Returned block, except that the borrower claims to have lost the item. If the item is not found within a specified amount of time (determined by library policy), then a replacement item may be acquired and the borrower assessed a fine to cover the cost of the replacement item. You can manually place this block on a borrower’s record from the CKO menu. A Lost block is automatically placed on a borrower’s record when a final overdue notice is sent to a borrower.</td>
</tr>
<tr>
<td>Lost Processing Fee</td>
<td>LostPro</td>
<td>This block is placed when a lost item processing fee, determined by library policy, is charged to a borrower.</td>
</tr>
<tr>
<td>Lost Recall</td>
<td>lr</td>
<td>This block is placed when a borrower had an item that was recalled, but the item was never returned and is now presumed lost.</td>
</tr>
<tr>
<td>Comment</td>
<td>note</td>
<td>Similar to Message to Borrower, this block allows you to make a comment not specifically directed to the borrower.</td>
</tr>
<tr>
<td>Notices: First, Second,... Final</td>
<td>notice1, notice2,... final</td>
<td>These blocks are placed when notices are generated for overdue items rather than for unpaid fines. A library can set Circulation to generate two, three, four, or more different overdue notices if the item is not returned. After the notices have been sent and the overdue items have not been returned, Circulation generates a final overdue notice and places a Final Notice block on the borrower’s record. After the Final Notice is sent and after a library-specified interval passes, Circulation replaces the Overdue block with a Lost block. If the lost item is checked in, the borrower will still be charged overdue fees.</td>
</tr>
</tbody>
</table>
### Block Function

##### Automatic Bill Sent

This block triggers Day End to generate a billing statement. When the statement is generated, Circulation attaches an Automatic Bill Sent block to each of the fine or lost blocks that have amounts included on the billing notice.

<table>
<thead>
<tr>
<th>Block Name</th>
<th>Block Code</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notices, Recall: First, Second,...</td>
<td>noticer1,</td>
<td>Similar to overdue notices explained in the previous block, these blocks are associated with overdue recalled items.</td>
</tr>
<tr>
<td>Final</td>
<td>noticer2,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>finalr</td>
<td></td>
</tr>
<tr>
<td>Never Send Notices</td>
<td>nsn</td>
<td>This type of block is usually placed manually when there is a borrower who should never be sent a notice. This block overrides the system-generated notifications.</td>
</tr>
<tr>
<td>Overdue Still Out</td>
<td>od</td>
<td>Circulation automatically generates this block if an item has not been checked in by its due date.</td>
</tr>
<tr>
<td>Fine Payment</td>
<td>payment</td>
<td>When a borrower pays a fine, Circulation deducts the amount paid from the total amount owed. Then it attaches a Payment for Fine block to the original block and moves the whole block to the History Blocks list.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To see the Fine Payment block, display the borrower’s block history, then view the Block Detail window for the appropriate block.</td>
</tr>
<tr>
<td>Phone Correction Requested</td>
<td>pcr</td>
<td>If you are aware that a borrower’s telephone number has changed, you can place this block on the borrower’s record. The next time the borrower checks out an item, you can update the borrower’s record.</td>
</tr>
<tr>
<td>Item is Recalled Before Due Date</td>
<td>recall</td>
<td>When you recall an item, a Recall block is placed on the record of the borrower who currently has the item checked out. This block changes the item’s due date and prompts Day End to generate a recall notice. The block will be resolved when the item is checked in.</td>
</tr>
<tr>
<td>Recalled and Overdue Still Out</td>
<td>odr</td>
<td>Circulation automatically generates this block if an item that has been recalled has not been checked in by its due date.</td>
</tr>
<tr>
<td>Refund of Payment</td>
<td>refund</td>
<td>When you refund a payment to a borrower, Horizon attaches this block to the original block to keep track of the date and the amount of the transaction. Horizon moves the whole block to the borrower’s block history list. Your library can create additional refund blocks that are attached manually.</td>
</tr>
<tr>
<td>Block Name</td>
<td>Block Code</td>
<td>Block Function</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Automatic Bill Sent</td>
<td>abs</td>
<td>This block triggers Day End to generate a billing statement. When the statement is generated, Circulation attaches an Automatic Bill Sent block to each of the fine or lost blocks that have amounts included on the billing notice.</td>
</tr>
<tr>
<td>Reminder Billing Notice</td>
<td>rn</td>
<td>Reminder notices can be sent out in addition to the regular overdue and billing notices. Your system administrator sets Circulation to generate reminders for borrowers who have more than a certain number of overdue items or who have a fine larger than a set limit. Since these reminders are sent in addition to the normal and overdue billing notices, they only need to be generated for borrowers who have many overdue items or large outstanding fines. Unlike Overdue and Billing notices, the reminders are not generated by Day End. Reminders are generated in Circulation Reports.</td>
</tr>
<tr>
<td>Reminder Invoice</td>
<td>ri</td>
<td>Reminder invoices combine information from all invoices for a borrower. The number of days Horizon will delay sending out a Reminder Invoice after a regular invoice remains unpaid is determined by your system administrator.</td>
</tr>
<tr>
<td>Request Deleted</td>
<td>rd</td>
<td>Circulation places this type of block when a bib record for a requested title has been deleted. In addition, if the request has been placed on a specific item, rather than any item with that title, then this hold will be placed if the item record is deleted.</td>
</tr>
<tr>
<td>Request Expired</td>
<td>re</td>
<td>If an item remains on request for a certain amount of time, Circulation cancels the request. The amount of time between the request and the cancellation is determined by library policy and set by your system administrator.</td>
</tr>
<tr>
<td>Requested Item Lost</td>
<td>rl</td>
<td>When Circulation marks a requested item as Lost, Circulation adds a Request Item Lost block to the requestor’s current blocks. Circulation adds this block only if the request is an item-specific request. The block does not apply to title-level requests.</td>
</tr>
<tr>
<td>Suspension until...</td>
<td>suspend</td>
<td>Your library has the option to suspend a borrower’s circulation privileges for a number of days until the library’s concerns about this borrower’s block issues are resolved. Attach this block to suspend a borrower’s privileges, and each time the borrower attempts to check out an item, this block appears. This block can be attached to a borrower’s record in addition to fines. The number of days privileges are suspended is specified in the circulation privileges view.</td>
</tr>
<tr>
<td>Block Name</td>
<td>Block Code</td>
<td>Block Function</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Automatic Bill Sent</td>
<td>abs</td>
<td>This block triggers Day End to generate a billing statement. When the statement is generated, Circulation attaches an Automatic Bill Sent block to each of the fine or lost blocks that have amounts included on the billing notice.</td>
</tr>
<tr>
<td>Waiver of Fine</td>
<td>waiver</td>
<td>When you waive a fine, Horizon deducts the amount waived from the total amount owed and then attaches a Waiver of Fine block to the original block and moves the whole block to the History Blocks list. To view a specific Waive of Fine block, display the borrower’s block history, then view the Block Detail window for the appropriate block.</td>
</tr>
</tbody>
</table>
Exercises

1.
2.
3.
4.
5.
6.
Occasionally a borrower may want to check out an item when either the borrower record or the item record (or both) does not exist in the database. Circulation gives you the option to quickly add items and borrowers. This is called fast-adding.

Fast-adding lets you add items or borrowers without filling out an entire item or borrower record. Later, you or another staff member can either edit the fast-added records to complete the information, or delete the fast-added records from your database and add new records according to library policy.

This chapter explains how to fast-add borrower records, item records, and bibliographic records. It also explains how to check in a fast-added item.

Item Group Editor (IGE) is a very useful tool that you use to make permanent or temporary changes to groups of items.

This chapter also explains how to use IGE for changing, archiving, and restoring changes that you make to groups of items.
FAST-ADDS AND ITEM GROUP EDITOR

FAST-ADDING A BORROWER RECORD

You can add new borrowers to Circulation to quickly check out items to these borrowers. You add a new borrower to the database by opening and completing a short version of a borrower record. You can later edit the record to complete the borrower’s record, or delete it if the borrower is not a long-term user of the library. The type of information you must enter in fast-added borrower records is determined in the borrower view.

Follow these steps to fast-add a borrower record:

1. Activate the Open CKI Window or Open CKO Window process.

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

2. Choose Borrower, New Borrower.

Horizon displays a blank Edit New Borrower window:

If your library has customized the Edit New Borrower window, the fields may appear in a different order or have different labels.

3. Enter the information appropriate to your customized window using the tables included here as a general guide:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter the location where the borrower is a patron. (Click Codes for a list of valid locations.)</td>
</tr>
</tbody>
</table>
4. Click **Save**.

5. Click **Close**.

---

While the location, Btype, Exp. Date, and Name fields are the only fields required to create a borrower record, you can add as much information as you want before saving the borrower record.

---

6. If you want a reminder to complete or delete the fast-added borrower record when the items he or she borrows are returned, add a note block to the record.
To do this, follow these steps:

1. Choose **Borrower, Find Borrower.**
2. Locate the borrower you just fast-added.
3. Choose **Blocks, Add Note.**
4. If Horizon displays the Edit Current Blocks window, skip to step 6 in this table.
5. If Horizon displays the Code Look-up Block Types window, double-click the type of note block you want to add.
6. Enter a comment in the **Comment** field.
7. Mark the appropriate **Action** button.
   This determines what type of action Circulation takes with the block.
   There are three action types:
   - **None.** Horizon takes no action on the block.
   - **Print.** Day End prints a notice or creates an e-mail message about the block to send to the borrower.
   - **Review.** Horizon adds the block to the Notice Review list. This lets the circulation staff review the matter to see if any other action is needed.

8. (Click **OK**.)

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

9. Click **Close.**

Horizon returns to the Checkout window with the borrower’s name displayed ready for checkout.

7. Proceed with normal checkout.

**FAST-ADDING ITEM AND BIB RECORDS**

Occasionally, a new or uncataloged item might slip past your cataloging staff and onto the shelves, or you may make an uncataloged item available for a borrower who needs information from that particular item. If a borrower wants to check out an uncataloged item, you can fast-add that item to Circulation as you check it out. Later, depending on your library’s policy, the item record can be edited, or deleted so that a new one can be created in Cataloging. The type of information you must enter in fast-added item and bib records is determined in the marc_usage view.

You can fast-add item records in two ways:

- **Item Record Only.** If a bib record already exists for the title, you can create just an item record. You should only fast-add an item record if a bib record for the title already exists in the database. In other words, if you have other copies of the same title, the general information, such as title and author, will already be in Circulation. You can search for the bib record that contains the general information and then fast-add an item record containing information specific to the uncataloged copy.
- Bib and Item Record. If neither a bib nor an item record exists, you can fast-add both.

**Follow these steps to fast-add item and bib records:**

1. Activate the **Open CKO Window** process.
   
The default location of this process is the **Circulation** folder on the navigation bar.
   
   Circulation opens the Checkout window.

2. Identify the borrower who wants to check out the item that you need to fast-add.

3. Choose **Item, New Item**.
   
   Horizon displays the Item Not Found/Fast Add dialog box:

![Image of Item Not Found/Fast Add dialog box]

4. Do one of these options:

<table>
<thead>
<tr>
<th>If you want to do this</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Create an item record                  | 1 Click **Find Bib**.  
2 Search for the title until the title’s Bibliographic Detail window displays.  
3 Choose **Send to, Checkout**.  
   Horizon displays the Edit Fast-Add window with the correct title and author already entered. |
| Create a bib record and an item record | Click **Bib & Item**.  
Horizon displays an Edit Fast-Add window for you to enter bibliographic and item data. |
Here is an example of a blank Edit Fast Add window:

- **Author**: Enter the author’s name. If you are fast-adding only an item, this field is filled in with the author from the bib record you found.
- **ISBN/ISSN**: Enter the numbers in the appropriate field, depending on which type of item you are fast-adding. If you are fast-adding only an item, this field is filled in with the bib information, if it exists.
- **Title**: Enter the full title of the item. If you are fast-adding only an item, this field is filled in with the title from the bib record you found.
- **Location**: Enter the code for the location where the item is housed. Click Codes for a list of valid options.
- **Collection**: Enter the code identifying the library collection this item is part of. Click Codes for a list of valid options. The collection code is particularly important for fast-added items, because the collection determines what happens to the item when it is checked in.
- **Call Type**: Enter the code identifying the item’s call type. Click Codes for a list of valid options.
- **Barcode**: Enter the item’s barcode number.
- **Item Type**: Enter the item type. Click Codes for a list of valid options.

6. Click **OK**.
Horizon processes the fast-added record and checks the item out to the borrower. It also creates an item record for the copy and attaches it to the bib record.

CHECKING IN A FAST-ADDED ITEM

When you check in a fast-added item, Circulation prompts you to do one of these things:

- **Do Nothing.** Check in the item as usual and reshelve it.
- Send the item to cataloging staff to be completely cataloged.
- Delete the item record but keep the bib record. Circulation does this automatically and displays a message informing you of the deletion.
- **Delete both the item and bib record.** Circulation does this automatically and displays a message informing you of the deletion.

Which action to take for fast-added items is determined by the collection to which the item is assigned. Your system administrator has specified for each collection the fast-add action that should occur when items of that collection are created and checked in.

Follow these steps to check in a fast-added item:

1. Identify the item in the Checkin window.
   Horizon displays a message box for the action to take on the type of fast-added item you are checking in. For example, this message prompts you to send the item to be cataloged:

   ![Message Box](image)

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

3. If the item needs to be cataloged, follow your library’s procedure to send the item through the full cataloging process.
Using Item Group Editor

Item Group Editor lets you make permanent or temporary changes to existing item records. To use Item Group Editor (IGE), you first create a group of items.

If you cannot edit item statuses, you may need to have this feature activated. (For more information, see your system administrator.)

Horizon links some item statuses to specific records. You cannot change these statuses in IGE; they are protected. You need to change them in the appropriate Horizon process, such as Circulation.

The default location of the IGE is the Administration/Group Editor Menu folder on the Navigation Bar.

In this section you will learn how to:

- Create an item group.
- Archive information about an item group.
- Edit information about an item group.
- Restore information about an item group.
- Clear archived information about an item group.

Creating an Item Group

Before you can use IGE to archive or edit information about the items in a group, you may need to create an item group. An item group can contain any items that exist in your library’s database. To create an item group, you can do any of these things:

- Search for items in IGE and create a new group. When you search for items, IGE displays your search results in a list. You can use all the items on that list as your group, or you can choose items from that list to create a smaller group.
- Use an existing group or list as your group.
- Choose items from an existing group or list to create a group. You can sort and choose items from groups and lists until the group that you want to edit contains only those items that you want it to contain. When you open IGE, Horizon displays a compound search as its initial search screen. A compound search lets you be more specific about what items go into your group.

When you highlight certain indexes, the Entry Aid button on the Compound Search window changes to “Show Codes.” Clicking the Show Codes button lists the valid codes that you can choose to narrow your search.
Horizon displays search results in the List Item Group Editor window:

You can start a new search or add more parameters to a current search at any time by choosing a different search option, such as Search or Where, from the File menu. The Sort and Display functions let you arrange the items that your search finds. This can help you choose similar items for your group.

In this section you will learn how to:

- Create a new item group.
- Use an existing item group.

**Creating a New Item Group**

IGE lets you search for items to create a new group. IGE uses a compound search as its initial search screen, but you can also search using a simple search screen or a Where clause. You can also handpick items from your search results to assure that your group contains only those items that you want it to contain. Your group can contain any items that exist in your library’s database.
Follow these steps to create a new item group:

1. Activate the **Item Group Editor** process.

   The default location of this process is the **Administration/Group Editor Menu** folder on the navigation bar. Horizon opens the List Item Group Editor window and a Compound Search window:

   If you are already in Item Group Editor, you can choose one of the three search options from the File menu. However, if the List Item Group Editor window already contains data, Horizon replaces the data when you do a new search. Unless you want to add criteria to a previous search by marking the Append List box, make sure that you finish working with any existing data in the List Item Group Editor window before you start a new search.

2. Highlight the search index in which you want to search.

3. Enter the term or code for which you want to search in the **Search for** field.

4. If you want to add another search parameter, do one of these options:
   - Mark the **AND** button (to limit your search).
   - Mark the **OR** button (to expand your search).
5. Continue adding search parameters until you enter all the search parameters that you want.

6. Click **Search**.

Horizon opens the List Item Group Editor window and displays the items in your collection that match your search criteria.

If Horizon does not find items in your collection matching your search criteria, a Search Message box opens telling you that nothing was found. Click **OK** to return to the Compound Search screen and enter new search criteria.

7. If you want to refine your search or start a new search, do one of these options:

<table>
<thead>
<tr>
<th>To use an SQL statement search</th>
<th>To do a Boolean search</th>
<th>To do a basic search</th>
</tr>
</thead>
</table>
| **1** Choose **File, Where clause**.  
If you choose the Where clause when Horizon is displaying the results of your current search, the parameters for the first search display in the Where clause field.  
**2** If you want to, do one of these options:  
  • To refine the search results, add to the parameters and click **Search**.  
  • To use different parameters, delete the displayed parameters and start a new search. | **1** Choose **File, Compound Search**.  
This lets you perform Boolean searches using the AND and OR operators.  
If you choose the Compound Search when Horizon is displaying the results of your current search, Horizon displays the parameters from the first search in the Search String window.  
**2** If you want to, do one of these options:  
  • To add to the previous search parameters, mark the **Append List** box. Then add to the parameters and click **Search**.  
  • To use different parameters, click **Clear Search String** and start a new search. | **1** Choose **File, Search**.  
**2** Highlight the index that you want to use.  
**3** Enter the search term that you want to use.  
**4** Click **OK**. |

When IGE is open, you can choose File and one of the search options at any time to perform new searches or to add to current searches.

8. Highlight the items in the List Item Group Editor window that you want to include in your new group.

   (To highlight the entire list, choose **Edit, Select All**.)

9. Choose **Group, Create Group**.
Horizon opens the Create Group dialog box:

If you have previously retrieved or created a group during this session, Horizon displays the name of that group in the Group Name field.

10. Enter a new name for the group in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.

11. Click **OK**.

Horizon returns to the List Item Group Editor window. You can now choose, archive, or edit the items in the group.

**USING AN EXISTING ITEM GROUP**

Item Group Editor saves the groups that you create. You can also create groups of items in the Table Editor using the `item_report` table. Item Group Editor lets you access these groups and archive or edit their data. You can sort and choose from the items in these groups to create additional groups of items.

---

A group created by someone else may have been created for a specific reason. Do not make any changes to a group or the items in it without checking with the person who created it. (For more information, see your system administrator.)
Follow these steps to use an existing item group:

1. Do one of these options:
   • If Item Group Editor is not open, do these steps:
     1. Open the **Item Group Editor** process.
        The default location of this process is the **Administration/Group Editor Menu** folder on the navigation bar.
        Horizon opens the List Item Group Editor window and a Compound Search window.
     2. Click **Cancel** twice.
        Horizon displays an empty List Item Group Editor window.
     3. Choose **Group, Retrieve Group**.
   • If you are already in Item Group Editor, choose Group, Retrieve Group.

When you retrieve an existing group, Horizon replaces any existing data in the List Item Group Editor window. Make sure that you finish working with any existing data in the List Item Group Editor window before retrieving a group.

Horizon opens the Retrieve Group dialog box:

2. In the **Group Name** field, enter the name of the saved group that you want to use, or click **Groups** to choose from a list of existing groups.
3. Click **OK**.

Horizon displays the group items in the List Item Group Editor window.
4. If you want to leave the original group unchanged, do these steps:

1. Choose items from the group to create a new group.
   (To highlight the entire list, choose **Edit, Select All**.)

2. Choose **Group, Create Group** to save the items you chose as a new group.
   Horizon opens the Create Group dialog box:

   ![Create Group dialog box]

   If you have previously opened a group during this session, Horizon displays the name of that group in the **Group Name** field.

3. Enter a new name in the **Group Name** field.
   You can add a date as part of the name to help you keep your groups organized.

4. Click **OK**.
   Horizon saves a second copy of the group under the new name.

5. You can now choose, archive, or edit the items in the group.

**ARCHIVING INFORMATION ABOUT AN ITEM GROUP**

IGE lets you archive the information associated with the items before you make any changes. This keeps the original item information safe in a separate table. Then you can make changes to the information, and Horizon displays those changes in your library’s database. To reverse the changes, you must restore the archived data. This brings the original information back into your database, replacing the changes you made.

Your system administrator controls who has the rights to use this feature.

---

You archive information about a group by using a unique name. Make sure that you remember the name and the contents of the group so that you can work with it later. You can add a date as part of the name to help you keep your groups organized.
Follow these steps to archive information about an item group:

1. Create a group.
2. Click **Archive**.

   Horizon opens the Archive Data dialog box:

   ![Archive Data Dialog Box]

   3. Enter a name in the **Group Name** field.

      You can add a date as part of the name to help you keep your groups organized.

   4. If you want to replace old archived data with new archived data, click **Groups** to choose from a list of previously archived groups.

   If you archive data using the same name as an existing group, you overwrite the original group. You also replace the original archived data with new data. Overwrite previously archived groups with caution.

   5. Click **OK**.

      Horizon displays an Archive Confirmation dialog box reminding you that only the data from the selected records will be archived. If you use an existing group name, Horizon also tells you that the entire group and all its previously archived data will be replaced.

      If you have not highlighted any rows, Horizon displays an Archive Confirmation dialog box that tells you that no records have been selected, that all members of the group will be archived, and that previously archived data will be replaced.

   6. Click **OK**.

      Horizon archives your group’s data and creates a group associated with it.
EDITING INFORMATION ABOUT AN ITEM GROUP

Item Group Editor lets you make permanent or temporary changes in your database by changing the information in a specific field for multiple items all at once. Once you choose the items for your group, you can make changes in the items’ cataloging information. If the changes are temporary and you want to restore the original information at some later date, make sure that you archive the original information before making any changes.

If you archive an item status of “i” (Checked In) or “s” (Shelving Cart) and you change it to any other status, the restore command cannot return the status to “i” or “s”.

IGE also lets you edit archived data. However, because archived data is information that you are holding to restore later, you should edit archived data only after careful thought and planning.

Follow these steps to edit information about an item group:

1. Do one of these options to display an item group in the List Item Group Editor window:
   - If you have not already created a group, create one.
   - If you have previously created an item group, or want to use an existing group, do these steps:

   1  Choose Group, Retrieve Group.  
     Horizon displays the Retrieve Group dialog box.
   2  Click Groups to choose from a list of existing groups.
   3  Double-click the group that you want to display.

2. If you are making temporary changes, make sure that you archive the group information.

3. Highlight the items whose information you want to change.
   (To highlight all items in the group, choose Edit, Select All.)

4. Click Edit.
   Horizon asks if you want to make a batch change to all the selected records.
   (If you have no items highlighted, Horizon displays the edit window for the item that the select arrow was pointing to when you clicked Edit.)

5. Click OK.
Horizon displays an Item Group Editor window:

6. Enter any information that you want to change for all selected items in the group.

   If you are not sure what information should go in a field, check with your system administrator.

7. Click Save.

8. Click Close.

Horizon displays the List Item Group Editor window with the changes that you made.

The window title bar may read “Edit Item Group Editor” if you are changing only one record. All other fields are the same.
9. If you plan to make other changes to the group at a later date (other than restoring the original data), do these steps:

1. Reselect the items that you changed.
2. Choose Group, Create Group to save the group with the first set of changes.

Horizon opens the Create Group dialog box:

If you have previously retrieved or saved a group during this session, Horizon displays the name of that group in the Group Name field.

3. Do one of these options:
   - Enter a new name for the group in the Group Name field.
     You can add a date as part of the name to help you keep your groups organized.
   - Click Groups to choose from a list of existing groups.

If you use an existing group name to save your new group, Horizon replaces the existing group. You cannot recover any original information contained in that group. However, if the existing group references archived material, Horizon does not let you overwrite it; instead, Horizon returns you to the Create Group dialog box so that you can choose a different name.

4. Click OK.

   Horizon returns to the List Item Group Editor window.

**RESTORING INFORMATION ABOUT AN ITEM GROUP**

Item Group Editor lets you restore item information from any data that you archive, as long as you have not overwritten the archived data by archiving another set of data with the same name. (If you overwrite or replace archived data, you lose the previously archived information.)

**Follow these steps to restore information about an item group:**

1. Activate the Item Group Editor process.

   The default location of this process is the Administration/Group Editor Menu folder on the navigation bar.

   Horizon displays the List Item Group Editor window and a Compound Search window.

2. Click Cancel twice.

   Horizon displays an empty List Item Group Editor window.
3. Do one of these options:
   - If you do not want to display a saved group before you start restoring, continue with Step 4.

   If the List Item Group Editor window already contains data, you must display the saved group that you want to restore or close Item Group Editor and reopen it to get an empty List Item Group Editor window.

   - If you want to display a saved group before you start restoring, do these steps:

     1. Choose Group, Retrieve Group.
        Horizon displays the Retrieve Group dialog box.
     2. In the Group Name field, enter the name of the group for which you want to restore information, or click Groups to choose from a list of existing groups.
        (You must choose the name of a group with archived data associated with it.)
     3. Click OK.
        Horizon displays the group in the List Item Group Editor window.
     4. Do one of these options:
        - To restore information in selected rows, highlight the items for which you want to restore information.
        - To restore information in all rows, do not highlight any items.

4. Click Restore.
   Horizon displays the Restore Data dialog box:

   If you have a group open, Horizon displays the name of that group in the Group Name field, as in this example.

5. In the Group Name field, enter the name of the archived group that you want to restore, or click Groups to choose from a list of existing groups.

6. Click OK.
Horizon displays a message like this one:

7. Click **OK**.

Horizon displays the List Item Group Editor window with the group that you archived. It also displays a Restore dialog box:

8. Highlight the columns that contain the information that you want to restore.

9. Click **OK**.

Horizon displays the restored information in the List Item Group Editor window.

10. Choose **File, Close** to close the List Item Group Editor window.

**CLEARING ARCHIVED INFORMATION ABOUT AN ITEM GROUP**

You can remove (or clear) archived data about an item group. You may want to clear archived data in these situations:

- You have archived groups that you no longer use.
- You have replaced one set of archived data with another set that you saved under a more descriptive name.
- You want to remove archived data about a group so you can use the group for something else.

Removing archived data is called clearing the archive.
Here is an example of how your library can use archive clearing. You may choose to archive data from a group of serials that you send to the bindery. Several of the serial subscriptions are discontinued and several others have been added, so the group is no longer valid. You can create a new group of the new serials and rearchive its information using a name that describes the new grouping. The old group, and the old archived data from that group, are now useless. You can clear the archive and delete the group.

When you archive data, Item Group Editor automatically creates a group that is associated with the archived data. Normally, this group functions in the background of the archive and restore functions, and you do not need to deal with it. However, if you clear an archive, the group still exists. Other users can access it. You may want to delete the Save Group if it is no longer necessary.

Make sure that no one else is using archived data or a group before you clear it or delete it. Once either one is gone, you cannot restore it. If a group still references archived data, you cannot delete or overwrite it.

Follow these steps to clear archived information about an item group:

1. Activate the Item Group Editor process.
   The default location of this process is the Administration/Group Editor Menu folder on the navigation bar.
   Horizon displays the List Item Group Editor window and a Compound Search window.

2. Click Cancel twice.
   Horizon displays an empty List Item Group Editor window.

3. Choose Group, Clear Archive.
   Horizon displays the Clear Archived Data dialog box:

4. Enter the name of the archived group that you want to clear, or click Groups to choose from a list of existing groups.

5. Click OK.
Horizon reminds you that the archived data associated with this group will be cleared.

6. Click **OK**.

   Horizon returns to the List Item Group Editor window.

7. If you want to delete the group, choose **Group, Delete Group**.

   Horizon displays the Delete Group dialog box:

8. Enter the name of the archived group that you just cleared, or click **Groups** to choose from a list of existing groups.

9. Click **OK**.

   Horizon reminds you that the group will be deleted.

10. Click **OK**.

    Horizon returns to the List Item Group Editor window.
Exercises

1.
2.
3.
4.
5.
6.
Chapter Six

Requests, Holds, and Reports

Horizon Circulation lets borrowers electronically request items that are checked out so that when they are returned, the requesting borrower has the first option to check out the item. A borrower (or a staff member on behalf of a borrower) places a request if an item the borrower wants to check out is already checked out to another borrower, or if the item is available only at another location. If an item remains in the request queue without being checked in for a certain period of time, Day End will cancel the request. Your system administrator determines the time period between placing the request and cancelling it.

Once a requested item is checked in, Horizon informs you of the request and prompts you to place it on hold for the requesting borrower. Responding positively to the interruptive prompt at Checkin changes the status of the item to “Item Being Held” and the borrower is notified that the item is reserved for him or her for a set number of days. You then put the item on the Holds Shelf and the borrower is notified so no other borrower can check out the item until the requesting borrower has a chance to check it out.

When Day End is run, the block prompts Circulation to generate a hold notice. You can print the notice and send it to the requester, notifying her or him that the requested item has been checked in. The borrower can then come in and check out the item. Your system administrator determines how long an unclaimed item remains on the hold shelf.

You may occasionally need to check out an item on hold to a borrower other than the one who has requested it. Horizon lets you override requests and check out items to other borrowers without removing the request from the item.

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

Circulation reports help you organize borrower requests and holds. The request, notice, and report functions of Circulation work together to accomplish their tasks. (For example, if a borrower requests a book which is then checked in and placed on the hold shelf, Circulation generates a notice informing the borrower that the item is available, and the notice is printed from Circulation Reports.)

This chapter explains these topics:

- Placing a request for a borrower
- Editing a request
- Deleting a request
- Filling a request
- Transferring the request queue
- Recording a requested item that is arriving
- Viewing a borrower’s requests
- Overriding a hold
- Reordering the hold queue
- Using Circulation reports
- Understanding types of reports
- Other reporting tools
Placing a Request for a Borrower

You can place a hold request on behalf of a borrower for an item that is currently unavailable. When you place the request, Horizon displays a message in the Hold Request window suggesting that the borrower confirm or update their contact information. Keeping contact information current helps you deliver hold notifications and other library communications to the borrower. You can edit a borrower’s contact information at the same time you place the request.

Your system administrator determines what contact information and message Horizon displays. If you do not want a message to display, your system administrator can remove it.

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

Follow these steps to place a request for a borrower:

1. Identify the requesting borrower in Checkout.
   Horizon displays the borrower’s name in the Checkout window.

2. Search for the requested item until Horizon displays the title in the Titles List, Bibliographic Detail, or Copies window.
   When Horizon displays the item in the Titles list, Bibliographic Detail, or Copies window, the item’s status displays at the top of the window or in the list window.

   If the borrower wants a specific copy of the item, search for it until Horizon displays it in the Copies window and then highlight it.

3. If Horizon displays a Bibliographic Detail or Copies window, go to step 5.
4. If Horizon displays a Titles List window, highlight the item that you want.
5. Choose Request, Make Request or press F5.
Horizon may not allow you to continue the checkout process for one of these reasons:

1) The borrower cannot pick up items at this location. If Horizon displays this message, your system administrator may need to edit the circulation parameters in the Table Editor.

2) Borrowers of this type cannot make requests at this location. If Horizon displays this message, the location's circulation privilege “allow requests” is set to not allow requests by this Btype. Check with your system administrator to change this setting, if necessary.

6. If the borrower wants a specific copy of the item, do these steps:

   1. Make sure the copy the borrower wants to use is the item for which Horizon is making the hold request.
   2. Mark the This Copy Only box.

7. Enter the pickup location code in the Pickup Location field.

   The pickup location is the branch of your library where the requester will pick up the item. If the requester will pick up the item at the branch where the item is stored, or if your library has only one branch, you can leave the location at the default. The pickup location prints on the hold notice you send to the borrower.
8. Enter any additional information you want printed on the hold notice sent to the requester in the **Comment** field.

9. Click **Save**.

   Horizon displays a message that the request has been made:

   ![Request Made](image)

10. Click **OK**.

11. If you want to change the borrower’s contact information, do these steps:

   1. Display the Checkout window for the borrower.
   2. Choose **Borrower, Edit Borrower**.
      
      Horizon opens the Edit Borrower window.
   3. Edit the contact information fields as necessary.
   4. Click **Close**.
Editing a Request

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

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

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

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

Follow these steps to edit a request:

1. Identify the borrower in Checkout.

2. Choose Borrower, Requests.
Horizon displays the Borrower Request List window:

3. Do one of these options:

<table>
<thead>
<tr>
<th>If you want to do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make changes to one request at a time</td>
<td>1. Highlight the request you want to edit.</td>
</tr>
<tr>
<td></td>
<td>2. Click <strong>Edit</strong>.</td>
</tr>
<tr>
<td></td>
<td>Horizon displays the Edit Request window:</td>
</tr>
</tbody>
</table>

Horizon displays the Edit Request window:
<table>
<thead>
<tr>
<th>If you want to do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make identical changes to several requests at once</td>
<td>1 Highlight the requests that you want to edit. All of the requests that you choose must have the same request status.</td>
</tr>
<tr>
<td></td>
<td>2 Click <strong>Edit</strong>. Horizon displays a Batch Edit Requests message asking if you want to make a batch change to all selected records.</td>
</tr>
<tr>
<td></td>
<td>3 Click <strong>OK</strong>. Horizon displays the Batch Change Requests window:</td>
</tr>
</tbody>
</table>

4. Do one or more of these tasks:

<table>
<thead>
<tr>
<th>If you want to do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change the pickup location</td>
<td>Enter the new pickup location code in the <strong>Pickup Location</strong> field. Click the <strong>Codes</strong> button for a list of valid locations. If the request status is “Hold Shelf,” you cannot edit this field.</td>
</tr>
<tr>
<td>Change the expiration date of the request</td>
<td>Enter the new expiration date in the <strong>Request Expire</strong> field. (This cannot be a date in the past.). If the request status is “Transit Hold” or “Hold Shelf,” you cannot edit this field.</td>
</tr>
<tr>
<td>Change the expiration date of the hold</td>
<td>Enter the new expiration date in the <strong>Hold Expire</strong> field. (This cannot be a date in the past.). If the request has any status other than “Hold Shelf,” you cannot edit this field.</td>
</tr>
<tr>
<td>Suspend the request</td>
<td>In the <strong>Suspend Until</strong> field, enter the date until which the request is suspended. (For example, if the borrower wants to suspend [postpone] the request until after a vacation, enter the date the borrower plans to return from vacation.) If the request has any status other than “Requested,” you cannot edit this field.</td>
</tr>
</tbody>
</table>
5. Click **Save**.

   Horizon saves your changes and returns to the list window.

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

7. Click **Cancel** or press **ESC**.

   Horizon closes the list window.

<table>
<thead>
<tr>
<th>If you want to do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reactivate the request before the suspend-until date</td>
<td>Enter the date to reactivate the request in the <strong>Suspend Until</strong> field. (This cannot be a date in the past.)</td>
</tr>
<tr>
<td>Delete, change, or add a comment</td>
<td>Delete unwanted comments, change existing comments, or enter new comments in the <strong>Comment</strong> field.</td>
</tr>
</tbody>
</table>
Deleting a Request

If a borrower no longer needs a requested item, you can delete the request. You can also delete a request using the Request Pull List.

Follow these steps to delete a request:

1. Identify the borrower in Checkout.
   Horizon displays the borrower’s name in the Checkout window.

2. Choose Borrower, Requests.
   Horizon displays the Borrower Request List window.

3. Highlight the request to delete.

4. Click Delete.
   Horizon asks you to verify that you want to delete the request.

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

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

This section explains these topics:

- Filling a request locally
- Filling a request with the first available item
- Filling a Request made at another location

Filling a Request Locally

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

Follow these steps to fill a request locally:

1. Check in the item in Checkin/Request Processing.

   Horizon displays a message telling you that the item is on hold and for whom it is being held:

   ![Message on Hold]

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

   You can print a mailing label or a hold slip or both. If you print a hold slip, you can put the hold slip with the book and put the book on the library’s hold shelf.

3. Click OK.

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

4. Follow your library’s procedures for mailing a notice or otherwise notifying the borrower, and for holding the item for the borrower.
FILLING A REQUEST WITH THE FIRST AVAILABLE ITEM

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

Before you can use this feature, your system administrator must enable the “Allow Transit Holds Override” field in the Location Parameters view.

Follow these steps to fill a request with the first available item:

1. Fill a request with an item that becomes available before the transit hold arrives.
2. Check in the transit hold copy when it arrives.

One of these things happens:

- If there is another borrower in the item request queue, Horizon displays a window telling you who the requester is and lets you choose to print out a mailing label for a notice, a hold slip, or both.
- If there is no other borrower in the item request queue, Horizon displays a window telling you that the item status has changed to “Transit” and to send it back to the originating library.

3. Do one of these options:

If you are prompted to print a mailing label or hold notice, do these steps:

1. Mark the boxes of the items that you want to print.
2. Click OK.
   Horizon prints the items that you selected and changes the item status of the transit hold to “Being Held.”
3. Follow your library’s procedure for notifying the borrower that their requested item is being held.
4. Do one of these options:
   • Put the item on the library’s hold shelf together with the hold slip, if you printed one.
   • Follow your library’s procedure for getting the item to the borrower.

4. If you are prompted to send the item to the originating library, follow your library’s transit procedure for returning the item.
FILLING A REQUEST MADE AT ANOTHER LOCATION

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

When a request is made at another location for an item shelved at your location, the request appears on the Request Pull List at your branch. You can use this list to pull the items to be sent to fill the requests at other branches.

Follow these steps to fill a request made at another location:

1. Check in the item.

   This identifies it as available for the request. Horizon displays a message similar to this one, telling you where to send the item:

   ![Message](image)

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

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

3. Click **OK**.

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

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

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

You can transfer the request queue from one bib to another. Here are some examples of instances where you might want to transfer a request queue.

- There are item specific requests on a lost or claim returned item.
- When deleting the last item attached to a bib and there are requests on that bib. If the requests are not transferred first, they will be deleted when the item is deleted.

When you transfer requests, Horizon first checks to see if the destination bib can be requested and checked out by a borrower. If there are requestable items, Horizon then checks the requests being transferred and makes the appropriate transfer. The following table shows how the transfer will be handled under different circumstances:

<table>
<thead>
<tr>
<th>If Destination Bib:</th>
<th>Then:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has no existing requests</td>
<td>Horizon transfers the request queue</td>
</tr>
<tr>
<td>Has a request queue of its own</td>
<td>Horizon merges the two bib’s request queues by date and time</td>
</tr>
<tr>
<td>Specific borrower has requests on both bibs</td>
<td>The duplicate is deleted. The request with the oldest date is retained.</td>
</tr>
</tbody>
</table>

When you transfer requests, you can view information about both titles to verify that you are transferring the requests to the correct bib. You can also choose to transfer item-level requests to bib-level requests.

It is not necessary to view the requests queues in PAC first. However, in this example we do so to demonstrate what is happening when the transfer takes place.

Follow these steps to transfer a request from one bib to another:

1. Open the bib whose request queue is to be transferred.
2 From the Request menu, look at the request list for the bib:

![Item Request Queue]

3 Open the bib to which the queue is to be transferred (destination bib).
Look at its request queue.

Here is what to expect with the transfer (as you compare the last 2 screens):

- Ken Bonney’s request on 9/16/2003 should be merged and become the first request in the queue.
- Jeff Olsen’s request will be placed second in the queue, based on the date and time stamp associated with the request.
- Debbie has requests on both bibs so the newest one (10/03/03) should be deleted and the one from 9/24/03 should be merged into date order.
- Linda’s request should be merged into date order.

Select **Transfer Request Queue** from the Circulation Control folder (inside the main Circulation folder).

The system displays the Transfer Request Queue window:
6 Enter **10504** in the Merge from Bib# field and click **Load**.

7 Enter **2000** in the Merge to Bib# field and click **Load**.

Notice the specific bib level information that displays so you can be sure you are transferring the correct information.
8 Click **Transfer Requests**.

A warning box appears letting you know that only requests which had a "Request" status and can be filled with the destination bib were transferred. This warning always appears even when all requests where transferred.

9 Click **OK** to dismiss the warning.

You can see that the resulting queue is in date order. In addition, the request from 10/3/03, which was Debbie’s duplicate request has been deleted.
Recording an Arriving Requested Item

When you receive items sent from other locations, you can notify Circulation that the items are available to the requesters for checkout. For each item, Circulation changes the item status to Item Being Held and then generates notices informing the requesters that their items are on hold.

Follow these steps to record an arriving requested item:

1. Check in the item.
   Horizon displays a window like this one, telling you who requested the item:

   ![Item on Hold Window]

2. Mark the boxes for the items you want to print.
   You can print a mailing label or a hold slip or both.

3. Click OK.
   Horizon prints the notices you selected and changes the item status to Being Held.

4. If you printed a hold slip, you can put it with the book and follow your library’s procedures for mailing a notice or otherwise notifying the borrower, and for holding the item for borrower to pick up.
Viewing a Borrower’s Requests

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

Follow these steps to view a borrower’s requests:

1. Identify the borrower whose requests you want to view in Checkout.
   Horizon displays the borrower’s name in the Checkout window.

2. Choose Borrower, Requests.
   Horizon displays the Borrower Request List window listing the requests made by the borrower:

   ![Borrower Request List Window]

3. If you want to delete a request, do these steps:
   1. Highlight the request you want to delete.
   2. Click Delete.

4. If you want to see a list of other borrowers who have requested this item, click Item Queue.
   You can reorder the hold queue from this window.
Overriding a Hold

You can override a hold for one borrower and check out the item to another borrower.

Overriding a borrower’s hold and checking out the item to another borrower causes Day End to place a Hold Canceled by Library block or a Hold Canceled by Library and Reinserted in Queue block on the requester’s record. If you reinsert the original borrower’s request, it appears at the top of the queue.

Follow these steps to override a hold:

1. Identify the borrower in Checkout.
   Horizon displays the borrower’s name in the Checkout window.

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

3. Click Yes to override the hold and check out the item; otherwise, click No.
Reordering the Hold Queue

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

You can also reorder the hold queue from the Checkin/Request Processing window, but you must check in the item first. If you do not want to check in the item, reorder the hold queue in Checkout or in staff searching.

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

Follow these steps to reorder the hold queue:

1. Do one of these options:

<table>
<thead>
<tr>
<th>From Checkout</th>
<th>From Checkin</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Identify a hold queue borrower.</td>
<td>1 Check in the item.</td>
</tr>
<tr>
<td>2 Choose <strong>Borrower, Requests</strong>.</td>
<td>Horizon tells you the item will be placed on hold for the first person in the hold queue.</td>
</tr>
<tr>
<td>Horizon displays the Borrower Request List window, showing the items the borrower has requested.</td>
<td>2 Choose <strong>Item, Requests</strong>.</td>
</tr>
<tr>
<td>3 Select the item whose hold queue you want to reorder.</td>
<td></td>
</tr>
<tr>
<td>4 Click <strong>Item Queue</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

Horizon displays the Item Request Queue window for the item:
2. Highlight the name of the borrower whose position you want to reorder in the hold queue.

3. Click **Reorder Queue**.

   Horizon displays the Reorder Request Queue window:

   ![Reorder Request Queue](image)

4. Enter the new position number of the borrower in the hold queue.

5. Click **OK**.

   The name is reordered in the hold queue.
**Using Circulation Reports**

Circulation Reports lets you access reports on notices, reminders, requests, and holds. It also lets you print notices and reminders.

There are several different reports you can access from Circulation Reports. This section gives an overview of these reports:

- In-house Use Statistics report
- Notice Review report
- Request Pull list
- Hold Shelf report
- Expired/Canceled Holds report

The Notice Review report is found on the Notices menu, and the Request Pull List, Requests, Hold Shelf, and Expired/Canceled reports are found on the Request menu. You can view and print any of the reports.

**Follow these steps to view and print reports:**

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

2. Choose the report to view from the **Notices** or **Requests** menu.
   
   Horizon briefly displays a Loading Data window and then displays the compiled report in a list window. Use your cursor or the scroll bar to view all items in the queue.

3. If you would like to print the report, choose **File, Print**.
In-House Use Statistics Report

You can keep track of individual item use statistics for non-circulating items (such as reference materials) or other items that are used within your library but not checked out.

Creating an In-House Use Statistics Report

To let you create an in-house use report, Horizon includes these indexes:

- **Used In-house.** This index is built on the dates when items were last used in-house.
- **In-house Uses.** This index is built on the total number of in-house uses that items have accumulated.

For in-house use statistics to be included in these indexes, circulation staff must check in items using in-house use mode. If you use a circulation tool such as PC Reliance or 3M Automated Circulation System to check in items, Horizon’s in-house mode is not available. Horizon cannot track in-house use statistics for items checked in using these tools.

Follow these steps to create a report of in-house use statistics:

1. Open the **item_report** view in the Table Editor. Horizon displays a search window.
2. Do one of these options to view in-house use for individual items in your collection:

<table>
<thead>
<tr>
<th>If you want to do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find items using the date each item was last used in-house.</td>
<td>Search on the <strong>Used In-house</strong> index. You can use the Date Range button to narrow the dates of your search by searching prior to or since a certain date, or by searching between a range of dates. (For example, you can search for items that were last used in-house since May 10, 2003.) You must enter your date in a numerical month/day/year format, such as “5/10/03.”</td>
</tr>
</tbody>
</table>
Horizon displays your search results by item in a List window.

3. To display the Used In-house and In-house Uses columns, do these steps:

<table>
<thead>
<tr>
<th>If you want to do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find items using the number of times each item has been used in-house.</td>
<td>Search on the <strong>In-house Use</strong> index. You can use mathematical terms as search parameters to narrow or broaden your search. (For example, you can enter “&gt;=3” to search for all items that have been used in-house three or more times.)</td>
</tr>
</tbody>
</table>
| Find items using multiple indexes. (For example, you can narrow your search for in-house use to a specific collection or location.) | 1 Click **Cancel** to close the Search window. Horizon asks if you want to load all the rows in this large view. Loading all the rows for this search could take a long time, depending on the size of your database.  
2 Click **OK**.  
3 Choose **File, Compound Search**. Horizon displays the Compound Search window.  
4 Do a compound search on any indexes you need to use to get the statistics you want. (For example, you can search on the Used In-House index and the Main Location index to find the dates when items in your main collection were last used in-house.) |

Horizon displays your search results by item in a List window.

3. To display the Used In-house and In-house Uses columns, do these steps:

1 Click **Display**. The Table Editor opens the Display window.  
2 In the **Choose columns to display** list, highlight the **Used In-house** and **In-house Uses** columns.  
3 If you want to, change the order that the columns display or the column width.  
4 Click **OK**.
The Used In-house column shows the date each item was last used in-house. The In-house Uses column shows the number of times the item has been used in-house:

![Image of a list showing Used In-house and In-house Uses columns]

4. Do one or both of these options:
   - To print the list, choose **File, Print**.
   - To save the data to a file, choose **File, Save**.
Notice Review Report

This report lists matters to review for further action. (For example, if an entry explains that a borrower needs to come in and pay a card fee, you can choose to send the borrower a notice about the fee.)

Entries appear on this report if a block is assigned a Review action. (See your system administrator for more information on which blocks have a Review setting at your library.)

Here is a sample Notices for Review report window:

![Notice Review Report Window]

- The list box lists all borrowers and the types of notices they should receive.
- Lets you sort the list according to selected criteria.
- Lets you change the type of information displayed for items on the notice list.

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

Changing the Action Setting in the Notice Review List

The Notice Review list lets you review notices and decide what should be done about them before you print or delete notices. (For example, you can change the current action for a notice to “Take no action” if the matter has been resolved.)

Follow these steps to change the action setting in the Notice Review list:

1. Activate the Circulation Reports process.

The default location of this process is the Circulation folder on the navigation bar.
2. Choose **Notices, Notice Review**.

   Horizon displays the Notices For Review list window.

3. Highlight the entry whose action you want to change.

4. Click **Edit**.

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

   ![Edit Notices For Review Window](image)

5. Mark the appropriate **Action** box/type:

   - **Take no action**. Circulation takes no action on the block.
   - **Print hard copy notice**. Causes Circulation to generate a hard copy notice or an e-mail message about the block to send to the borrower.

6. Click **Save**.

7. Click **Close**.

   Horizon returns to the Notices For Review list window.
Request Pull List

The Request Pull List is a listing of items to be gathered to fill borrower requests. When a borrower at any location requests an item that can be filled at your location, Circulation sends the request to this report. You can then print out the report and use it to find the requested items to place on the Holds Shelf or send to the proper location. You can also choose to not fill any or all items on the list.

If you do not respond to the request within twenty-four hours and there is another location with the title checked in, the request will automatically be transferred to the other branch’s Request Pull List. If the other branch does not fill the request, then the request may appear on your list again.

Here is an example of the Request Pull List window:
**Using the Pull List to Fill a Request**

When you open the Pull List, you are effectively “taking a snapshot” of the requests that the Horizon system indicates you can currently fill at your location. Keep in mind that requests are dynamic—and the more locations you have the more dynamic the requests list will be. Therefore, to maintain the highest levels of accuracy when you pull the Requests List, print it and fill it as quickly as you can (and pass unfilled requests on, if applicable).

**Workflow for a Multi-Branch System**

Horizon expects each location to print a Pull List to remove eligible items from the shelf. Generating the Pull List automatically assigns the location printing the report as the “fill” location with a “fill” date. The report also prints a specific barcode for the request, even when the request is not barcode specific.

Regardless of the barcode displayed, be aware that any eligible item from the requested bib record will actually fill the request when you check it in. Horizon fills the request with a specific item only when the request is made from the item level and the This Copy Only checkbox is checked in the Hold Request window.

Follow these steps to fill a request using the Pull List:

1. Open the Request Pull List (Circulation folder, Circulation Reports).
   Horizon displays a screen like this one:

   ![Request Pull List Screen](image)

   - **Selection**: Selection options for the list.
   - **List Mode**: Options for sorting and displaying the list.
   - **Title/Comment**: Details of the requested items.
   - **Main Library**: Location of the requested item.
   - **Main Barcode**: Barcode of the requested item.
   - **Main Collection**: Main collection details.

2. Use the available buttons to sort and display the list in the order you prefer.

3. Select **File, Print** to send the list to the designated printer. (Be sure to leave the Pull List Report displayed on the screen.)

4. Go to the shelves and retrieve the items that you can fill.
5. Make a note of any items not found on the shelf.

6. Check in the items found on the shelf.

   Horizon displays a message indicating what you should do with each item (either place it on your Hold Shelf or send it [in transit] to another location).

7. Return to the Pull List window that you left open, Click **Keep List**, and close the window to complete the workflow.

   Remember that Keep List forwards any unfound items on the list to the next location.

8. For items not found on the shelf, check PAC to see if other items are available.

   • If there are no other copies available, staff will need to delete the request and notify the borrower. This can be done by clicking on the Delete Request button from the Pull List window, or by checking the item in. Remember to change the status of the item to Trace (either from Checkin or from IGE).

   • If other copies are available, you can change the status of the item to Trace (or another local status to indicate it is missing from the shelf) through IGE.

**Workflow for a Single Branch System**

Follow these steps to fill a request using the Pull List:

1. Open the Request Pull List (Circulation folder, Circulation Reports).

2. Use the available buttons to sort and display the list in the order you prefer.

3. Select **File, Print** to send the list to the designated printer.

4. Click the **List Pulled** button.

5. Close the Pull List and also close the larger Circulation Reports window.

6. Go to the shelves and retrieve the items that you can fill.

7. Note any items that are not found on the shelf.

8. Check in the items found.

   Items not found will continue to appear on the Pull List until the request is deleted, or until the request expires. When the request is deleted, Horizon generates a block on the borrower’s record that will notify the borrower of the change.

**Using the Pull List to Delete a Request**

You can delete single or multiple hold requests using the Pull List. When you do this, the status of the request in the borrower’s Current Blocks record changes to “Request Deleted.” Also, a comment is recorded in the Block Detail with information about how it was canceled and by whom.
Before you can delete hold requests using the Pull List, your system administrator must enable the “Delete request” program feature for your passkey.

Follow these steps to delete a request using the Pull List:

1. Activate the Circulation Reports process.
   
   The default location of this process is the Circulation folder on the navigation bar.

2. Choose Requests, Request Pull List.
Horizon displays the compiled report in the List Request Pull List window:

3. Highlight the title for which you want to delete the request.
   You can choose multiple titles.

4. Click **Delete Request(s)**.
   Horizon asks you to verify that you want to delete the request.

5. Click **OK**.
   Horizon deletes the request and removes the item from the list in the List Request Pull List window.

6. Choose **File, Exit**.
   Horizon asks you to confirm that you want to keep the list.

7. Click **Yes** to save the list.
   Horizon closes the Request Pull List.
Hold Shelf Report

This report lists all requested items that have been checked in but have not yet been picked up by the requester. You can sort the report according to different criteria, such as by borrower.

Here is a sample Hold Shelf report window:

When a borrower cancels a hold for an item already on the hold shelf, the status indicates that the item should be removed from the hold shelf.
Expired/Canceled Holds Report

The Expired/Canceled Holds report shows you a list of holds expired or canceled since the last Day End process was run. It is similar to the Hold Shelf Report in that it uses the same selection criteria. However, this report shows only expired and canceled holds.

You access this report through the Requests menu in the Circulation Reports submodule. Here is a (blank) example of the List Expired or Canceled Holds window:

If any holds had expired or had been manually cancelled by library staff, they would appear in this list.
Exercises

1.
2.
3.
4.
5.
6.
Chapter Seven

Notices and Invoices

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

This chapter explains these topics:

- Types of notices
- Generating notices
- Using the notice review
- Printing invoices, reminder invoices, notices, and reminders
Types of Notices

Notices are forms that inform the borrower of fees or fines owed. You cannot alter what kind of information is displayed on a notice or the order in which it is displayed unless you use a third party report writer to alter them.

Horizon automatically generates notices when either Day End or the notice generator in Circulation Reports is run, and notice parameters are met. These parameters are set by your system administrator and can include an amount that is owed and the number of items overdue.

This is an example of a notice:

![Notice Example]

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

- Hold and Request notices
- Recall notices
- Overdue notices
- Billing notices
- Reminder notices
- Invoices
- Reminder invoices
Hold and Request Notices

Hold and request notices are generated by Day End when an action has been taken on a hold or request. Which specific notices your library sends out depends on your library policy. (For example, almost all libraries send notices informing borrowers that a requested item is now on hold and they can come in to check it out. However, only some libraries send out notices when a requested item expires, or when the library cancels a hold.)

Recall Notices

A recall notice is a request for a borrower to return an item before its due date. The notice is generated by Day End when a Recall block is detected on the borrower’s record. After the notice has been generated, the block is moved to the borrower’s history blocks record.

Here is an example of a recall notice:

Overdue Notices

An overdue notice is sent to a borrower when a checked out item becomes overdue. Several different overdue notices can be sent out. As an example, your library might send out the first notice a week after an item becomes overdue, and then send out a notice each week for the next three weeks if the item is not returned. The number of notices sent out is set by your system administrator.

Overdue notices are generated by Day End when Circulation detects an “Overdue Still Out” block on the borrower’s record. When a notice is generated, Circulation places the corresponding block on the borrower’s record. For example, a First Notice block is attached to an “Overdue Still Out” block once the first notice is generated.
Here is a sample overdue notice:

```
Mel Rascovi
334 W. Riata Dr.
Gilbert, CA 93554

Address Correction Requested

The following item(s) is (are) overdue. Please return the item(s) at your earliest convenience.

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Item Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-10-03</td>
<td><em>Wizard of Oz</em></td>
</tr>
<tr>
<td></td>
<td>Dynix M.183.08 T98 c. 2 19482726</td>
</tr>
<tr>
<td>1-06-03</td>
<td><em>Backwoods: An American Roadtrip</em></td>
</tr>
<tr>
<td></td>
<td>Dynix 654.98 M2 c. 1 82763598</td>
</tr>
</tbody>
</table>
```

**BILLING NOTICES**

Billing notices are sent when a borrower’s total fine amount reaches a set limit. Your library determines the limit fines must reach before sending a billing notice. Since the billing notice is generated for the total fine amount, the notice does not list each individual fine amount, but instead gives the total amount due.

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

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

Here is a sample billing notice:

```
Rascovi, Mel
334 W. Riata Dr.
Gilbert, CA 93554

Address Correction Requested

The following charges have been incurred since the last notice and should be paid immediately. Thank you for your prompt attention to these charges.

<table>
<thead>
<tr>
<th>User ID</th>
<th>Photocopy card</th>
<th>2.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gone With the Wind.</td>
<td>Lost</td>
<td>20.00</td>
</tr>
<tr>
<td>M.347.98 C.4</td>
<td>1762736</td>
<td></td>
</tr>
<tr>
<td>The Firm</td>
<td>Lost</td>
<td>20.00</td>
</tr>
<tr>
<td>epixtech</td>
<td>epixtech</td>
<td></td>
</tr>
<tr>
<td>Gnpd888.9 C.1</td>
<td>250253883</td>
<td></td>
</tr>
</tbody>
</table>

Total Charges Outstanding: 42.00
```

You can disable the generation of billing notices for different locations.
REMINDER NOTICES

Reminder notices (referred to as reminders) combine both overdue notices and billing notices and are sent out in addition to the normal overdue notices and billing notices.

Reminders are generated manually, rather than automatically by Day End. When you select the Print Reminders command in Circulation Reports, Circulation checks to see if there are any borrowers who have exceeded a certain number of overdue items or who have more than a certain fine amount. Reminders are generated for borrowers who have exceeded at least one of these limits.

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

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

Here is a sample reminder:

```
Horizon Library
Dynix 1-06-03

Rascovi, Mel
334 W. Rasta Dr.
Gilbert, CA 95554

Address Correction Requested

The following item(s) is(are) overdue:  
Due Date
A Time to Kill          01-10-03
Dynix: Gris. 178.M19 c.2
16599372

The following charges remain outstanding. Please arrange to pay these charges at your earliest convenience.

User ID  Photocopy card  1.05
The Firm  Lost  30.00
Dynix
Gris.173.M18 c.4
1013458

The Kid's Book of Questions  Lost  28.95
Dynix
Whi. 679.B c.1
6374898

Invoice 2387  Fees  15.60

Total Charges Outstanding:  75.60

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

INVOICES

Numbered invoices can be produced according to a library-specified billing cycle. Invoices list previously un invoiced fees but do not include unpaid balances or details of unpaid previous invoices.
This is an example of a printed invoice:

```
Invoice No. 29
02-24-03

Horizon Library
Dynix

To: Rascovi, Mel
334 W. Riata Dr.
Gilbert, CA 93554

Assessed
02-24-03
02-24-03

Fee Code
fee
sales_tax

Description
Payment for replacing damaged book
Sales tax

Price
15.00
0.75

Total due this invoice: 15.75

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

Invoices are generally grouped according to four categories:

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

Monthly invoices might be sent out for interlibrary loan fees and photocopy fees to all Btypes when a borrower accrues a $5.00 total of these two fee types. Weekly invoices might be sent out to all Btypes for overdue fines when borrowers have accrued $2.50 in fines.) Your system administrator sets up the types of invoices, the Btypes to which invoices are sent, the fee types for which invoices are sent, and the amount threshold for each invoice type.

Your library can set up as many invoice types as needed.

**Reminder Invoices**

Reminder invoices combine information from all invoices for a borrower and are sent out in addition to the regular invoices. With the Reminder Invoice, all of the accumulated charges on one borrower’s account are gathered on one invoice. The number of days Horizon will delay sending out a Reminder Invoice after a regular invoice remains unpaid is determined by your system administrator.
Here is a sample of a Reminder Invoice:

<table>
<thead>
<tr>
<th>Invoice No.</th>
<th>Fee Code</th>
<th>Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>119</td>
<td>fee</td>
<td>Payment for replacing damaged book.</td>
<td>15.00</td>
</tr>
<tr>
<td></td>
<td>sales tax</td>
<td>Sales tax</td>
<td>0.75</td>
</tr>
<tr>
<td>130</td>
<td>fee</td>
<td>Payment for replacing damaged book.</td>
<td>34.00</td>
</tr>
<tr>
<td></td>
<td>sales tax</td>
<td>Sales tax</td>
<td>1.75</td>
</tr>
</tbody>
</table>

Total due invoice: 15.75
Total due invoice: 35.75
Total due all invoices: 51.50

Reminder invoices are generated manually, rather than automatically by Day End.

In Circulation Reports, Horizon sorts printed Reminder Invoices by Borrower number and Invoice number.

Horizon Library
Dynix
03-14-03
Reminder Notice

TO: Rascovi, Mel
334 W. Riata Dr.
Gilbert, CA 93554

Invoice No. 119
dated 01-14-03

Assessed | Fee Code | Description                  | Price |
----------|----------|------------------------------|-------|
12-21-02  | fee      | Payment for replacing damaged book. | 15.00 |
12-21-02  | sales tax| Sales tax                    | 0.75  |

Total due invoice: 15.75

Invoice No. 130
dated 02-14-02

Assessed | Fee Code | Description                  | Price |
----------|----------|------------------------------|-------|
01-24-03  | fee      | Payment for replacing damaged book. | 34.00 |
01-24-03  | sales tax| Sales tax                    | 1.75  |

Total due invoice: 35.75
Total due all invoices: 51.50
Generating Notices

Notices are generated in one of these ways:

- **By Day End.** Horizon generates notices automatically when a borrower has an unresolved block, when the time interval set in “1st Notice Delay” has elapsed, and there is an action setting of “Print.”

- **By Library staff.** You can generate notices manually when you choose Notice, Notice Output in Circulation Reports. Borrowers with unresolved blocks with an action setting of “Print” are included in the output batch.

Only those blocks that have a default action of Print will trigger a printed notice. (For example, a Waiver of Fine block is usually not set to print, so it will not generate a notice. A Billing Notice block, however, is almost always set to print, so it will trigger Horizon to generate a billing notice.) Your system administrator gives each block a default action setting.

Horizon lets you selectively print notices. You can send a single notice or a small number of notices because the printer jammed while printing. You may have borrowers request that you resend notices to them.

If you opt to do so, you can send email notices rather than printed notices. Your system administrator performs a number of setup procedures to prepare for notices, whether you print them or send them out as emails.

---

Generating notices is not the same as printing them. Most of the notices are generated automatically by Day End. Day End, however, only compiles the notices; it does not print them. Library staff print the notices using Circulation Reports.

---

**Using the Notice Review List**

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

Entries are placed on this report if a block is assigned a Review action. Your system administrator determines which blocks have a Review setting at your library.

To print a notice, you change the action setting on the report entry.
Printing Invoices, Reminder Invoices, Notices, and Reminders

Once Day End has generated notices, they are ready to print. You can print notices, as well as reminders and invoices, from Circulation Reports.

You can print a batch of invoices, reminder invoices, notices, or reminders from Circulation Reports for groups of borrowers. You can print individual invoices or reminder invoices for fees assessed for the current borrower identified in Circulation.

This section explains these topics:
- Generating e-mail notices
- Printing a batch of invoices, reminder invoices, notices or reminders.
- Printing a single invoice
- Printing a single reminder invoice
- Reprinting old invoices

Generating E-mail Notices

You can set up and configure email notices in Horizon, and then generate and automatically send those notices to your borrowers using Circulation Reports. You can also set up Horizon to generate an email text file. You can use a third-party program to access the email text file, modify it, and send it as a customized email message.

Horizon email includes these features:
- SMTP-based email creation and delivery for unmediated email notices.
- Flat-files are still supported. Make sure that you review the extraction program to accommodate the changes in the available fields.
- New fields (Author, Expiry date, and Pickup Location) are available for notices. This also applies to printed notices.
- An option to resend part or all of a notice batch. This applies to printed notices also

Printing a Batch of Invoices, Reminder Invoices, Notices, or Reminders

You can print batch invoices, reminder invoices, notices, or reminders from the Circulation Reports submodule.

Follow these steps to print a batch of invoices, reminder invoices, notices, or reminders:

1. Activate the Circulation Reports process.

   The default location of this process is the Circulation folder on the navigation bar.
2. Choose **Notices, Notice Output**.

Horizon displays the Notice Batch List window:

![Notice Batch List](image)

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

3. Click **New Batch**.

Horizon displays the Select notice type window:

![Select Notice Type](image)

4. Choose the notice type you want to print:

   - **Auto Notice**. This is a system-generated notice.
   - **Reminder Notice**. This is a follow-up notice to one already sent.
   - **Invoice Notice**. This is a numbered invoice.
   - **Reminder Invoice**. This is a follow-up invoice to one already sent.
   - **New Debt Collect**. This is a Debt Collect notice (appears if you own the Debt Collect product).
   - **Upd Debt Collect**. This is an updated DebtCollect notice (appears if you own the DebtCollect product).
   - **Cancel**. This cancels the procedure.
Horizon displays a monitor window while the notices, invoices, or reminder invoices that meet the criteria are collected:

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

5. If you want to print several batches at once, repeat steps 3 and 4 to create the remaining batches.

6. Highlight the batches you want to print.

7. Do one of these options:

<table>
<thead>
<tr>
<th>If the notification type is this</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Printed notice                  | 1 Click **Output**.  
Horizon displays the Print window.  
If this is the first time you have printed notices, Horizon prompts you to select font settings. Click **OK** to display the Font dialog box. Choose any options you want and click **OK**.  
2 Click **OK** to print. |
### Printing a Single Invoice

You can print individual invoices for fees assessed for the current borrower identified in Circulation.

**Follow these steps to print a single invoice:**

1. Identify the borrower in **Checkout**.
2. Choose **Blocks, Print New Invoice**.
   
   Horizon either displays a message that no new fees have been accrued or tells you how much the invoice will be.

3. Click **OK** to continue.
   
   Horizon prints the invoice.

### Printing a Single Reminder Invoice

You can print individual reminder invoices for the current borrower identified in Circulation.

The number of days Horizon waits to generate a reminder invoice applies only to batch creation. You can print a single reminder invoice for a borrower regardless of the reminder invoice delay set up by your system administrator.

**Follow these steps to print a single reminder invoice:**

1. Identify the borrower in **Checkout**.
2. Choose **Blocks, Print Reminder Invoice**.

### Table: Notices and Invoices

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<thead>
<tr>
<th>If the notification type is this</th>
<th>Do this</th>
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| DebtCollect or e-mail          | 1. Click **Output**.  
                                     Horizon displays the Save Email File As window.  
                                     2. Select the drive and directory where you want to save the text file of notices.  
                                     3. Enter the file name for the text file.  
                                     4. In the **Save as type** field, choose the format you want.  
                                     5. Click **Save**.  
                                     Horizon saves the notice information in a text file.  
                                     You can use FTP or attach this text file to an e-mail message to send to the collection agency.  
                                     To send e-mail notices, you can write a program or use a third party software program to process the text file into an e-mail message that your e-mail system can read. |
Horizon notifies you if there are no invoiced amounts pending for the borrower.

3. Click **OK** to continue.

Horizon prints the reminder invoice.

**REPRINTING OLD INVOICES**

You can reprint old invoices for the current borrower identified in Circulation.

**Follow these steps to reprint old invoices:**

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

2. Choose **Blocks, Reprint Old Invoice** to display a list of previously printed invoices.

3. Double-click on the invoice you want to reprint.

Horizon prints the invoice.
Exercises

1.
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3.
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6.