Searching, Adding, Editing and Deleting Borrowers in Horizon

1. Searching, Adding, Editing and Deleting borrowers is normally done by opening the Checkout Window in Horizon. Under Circulation, double click on CKO.

2. Once the Checkout Window is open, **always** first search for the borrower by scanning the borrower's barcode, or press the F4 key, or use the Borrower/Find Borrower menu option.

3. Borrowers can be searched by name, phone number, number or keyword – example: Borrower Keyword Gregory finds all borrowers with the word Gregory in their names. If you are adding a new borrower, first verify that the borrower is not already there. If you are looking for an existing borrower, find the borrower and click OK to place them in the CKO Window.

4. To Add: After determining that the borrower does not exist in the database, use F5 to add a new borrower and fill in the fields. Absolutely necessary fields are: Location, Btype, and Name. Your library determines which additional information you should always add. All libraries are asked to add the birthdate to help distinguish between possible duplicate patrons.
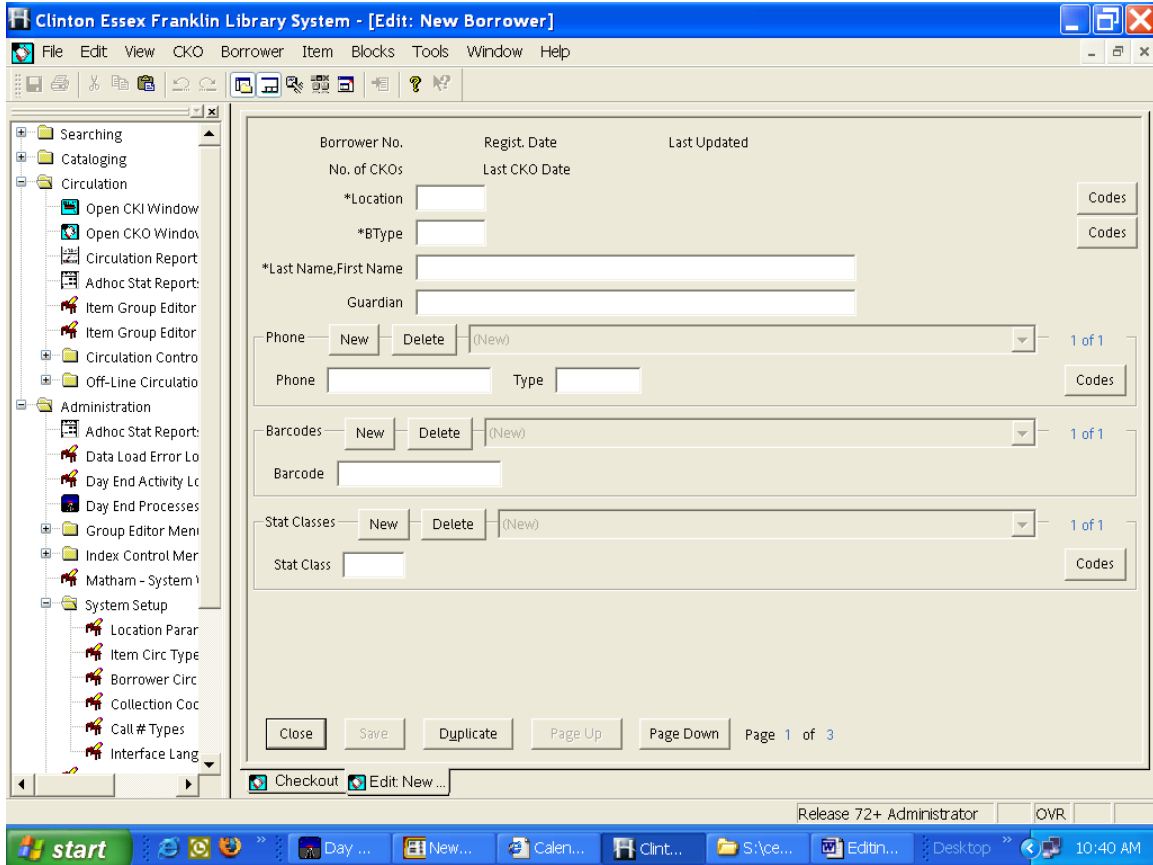
    We recommend you always put in Phone Number, Barcode, Address, Email Address if they have one, and PIN#. The PIN number we usually use is the last 4 digits of the phone number. Bstats are optional but very useful, and the library should adopt a procedure about which ones to use for every patron.

    Once all information is entered, click save. The patron will appear in the window ready for checkout, but you can ignore this and do a new search (F4) and add a new patron (F5).
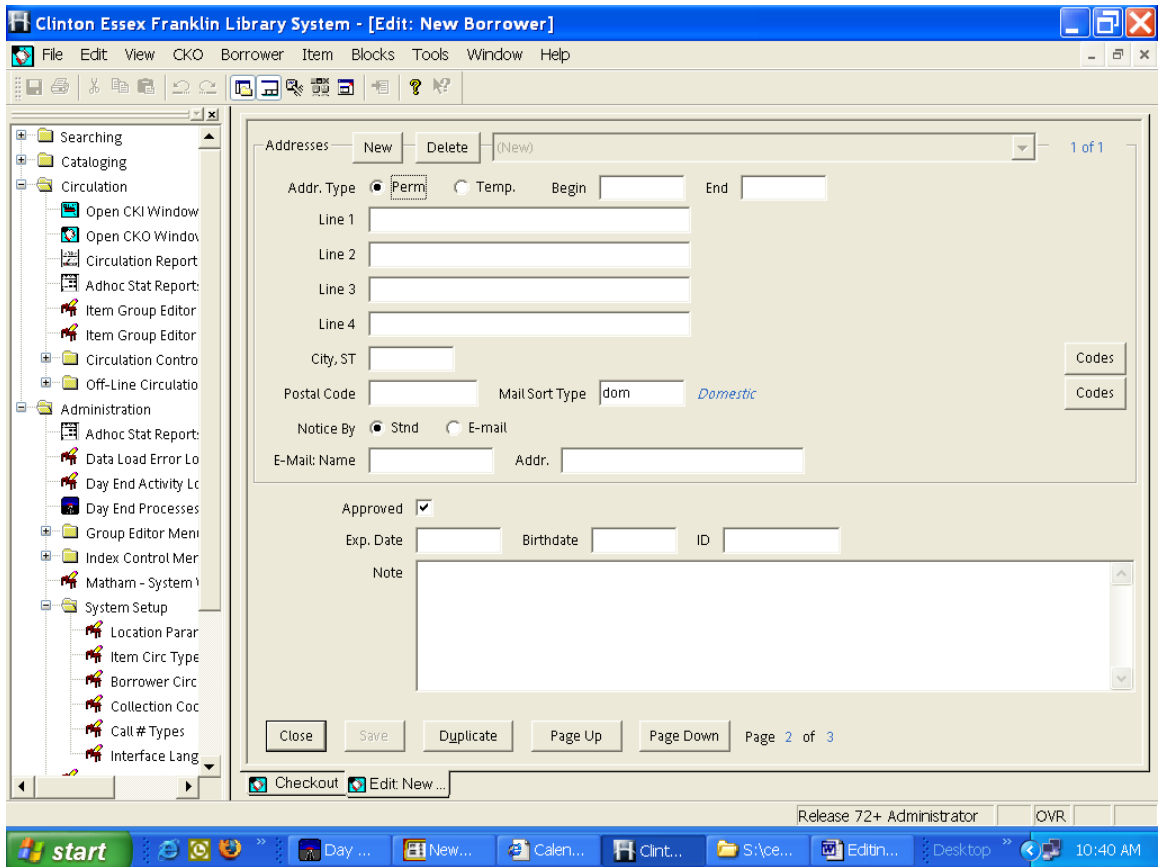
5. Although there is an option on the Borrower menu to Delete Borrower, it is usually grayed out.

6. To delete the borrower, you need to go to first choose to edit the borrower, then the option will be active.

7. You can edit the borrower by using F6 or the menu item Borrower/Edit Borrower. (If a block appears, you'll need to click on CKO and possibly override first).

8. The system will stop you from deleting the borrower if any items are checked out or there are any blocks.

9. The initials FED should help: Find, Edit, Delete.

10. Be careful not to delete borrowers belonging to other libraries!
Three screens of information can be entered for borrowers:

1.

2.

3.