CEFLS Horizon Procedures
Step By Step – Check on Your Old Requests

Periodically, you will want to check the requests that your patrons have placed, or that you have placed for them in Horizon. You have the power to redirect a stranded request so that it can be filled. Patrons are not always aware of how the system works, so you may want to assist them in getting the items faster, or let them know why their request is not succeeding.

How to do it:

1. Double click on the Circulation folder, and double click on Circulation Reports.

2. The Circulation Reports gray window opens on top of Horizon. At any time, you can minimize it by clicking on the small "minus sign" at the top right of the gray window.

3. Click on Requests, then Requests.

4. A message appears: "Loading Data for All Requests"

5. After a minute or so, a list of all active requests appears. At the bottom of the window you can see how many requests there are waiting to be filled in the whole system.

6. Click on Sort.

7. Highlight Location and Request Date, then click OK.

8. The list is now sorted by Location, meaning the home location of the library patron who placed the request.

9. Look for your Location by scrolling down with the scroll bar on the right.

10. When you reach your Location, you will see that the first listed request is the oldest one.

11. Highlight the requests that are over a month old, and print them using the printer icon at the top left of the window.

12. Now close or minimize the gray circulation reports window.

13. The list includes several important pieces of information. For example:

On the first line below there is the date of the request, the position in the "queue", the status (either request or transit hold), the title, and the location.

On the second line below there is the borrower's name (usually a personal name, but sometimes an organization), the Bib #, and sometimes the Item #. The Item # appears if the request was on a specific item, or if the item has already been checked in to fill the request and put in transit.

197.	04/13/07	1	Request	Medal of honor : profiles of America's military heroes		Clinton Essex
	Bare Hill Correctional Facility			204721 382405		
198.	05/03/07	1	Transit Hold	Worldwar : upsetting the balance /		Clinton Essex
	Camp Gabriels			192014 361941		
199.	11/20/07	2	Request	90 minutes in heaven : a true story of life & death /		Clinton Essex
	Bare Hill Correctional Facility			277375		
200.	01/09/08	1	Request	Bloody bones /		Clinton Essex
	Bare Hill Correctional Facility			189339		
201.	01/23/08	2	Request	People of the book : a novel /		Clinton Essex
	Lyon Mountain Correctional Facility			351141		
202.	01/29/08	1	Request	Never too rich /		Clinton Essex
	Bare Hill Correctional Facility			72202		
203.	01/31/08	1	Request	Covencraft : witchcraft for three or more /		Clinton Essex
	Clinton Correctional Facility - Main			278870		

You can use the Bib # to investigate. For example, in the case above, if a staff member wanted to know why request 197 had not been filled, they would:

1. In Horizon, press the f2 key to initiate a search.
2. Click down 5 clicks in the window to find the Bib# search.
3. Type in the Bib# 204721.
4. You will see that there are 6 items that could fill the request, but one of them is marked "missing". The rest are checked in. Since the request was placed (by staff) on a specific item (This item only), it has stalled.
5. If the staff member believes that the use of "This item only" was not on purpose, he or she could delete the request and place it again for this patron on the title and it would probably be filled.

Other situations you can find are:

1. An item at automated library has been marked missing, but other items are available at unautomated libraries (owned), or there are no available items in the system. You can delete the request and put it in on ICICILL.

2. A patron has requested a popular item. There are many requests on the regular print edition, but none on the large print edition. If you know your patron would be happy with the large print edition, you can delete the request and put it in again on that edition.

3. The item is in a long queue. You don't need to take action because it is normal for popular items to take longer to fill. You might want to buy a copy if it's something you don't have.

4. The item apparently was placed in transit and never received (Transit Hold). It could be that the patron did receive it, but it was not checked out correctly. In that case, just delete the request. If the patron never did receive it, delete the request and place it again.

If you need to delete a request, you can do it either from the bibliographic information screen or the checkout window.

From the bibliographic detail screen (after using f2 to find the bib record):

1. Use the "Requests" menu at the top of the Horizon window.
2. Click "View Title Request List"
3. Highlight the request, and delete it. Do this only for your own patrons' requests!

From the Checkout window:
1. Find the patron, using f4.
2. Overcome any block screens by clicking CKO and Override, if necessary.
3. Use the "Borrower" menu at the top of the Horizon window.
4. Click "Requests"
5. Highlight the request, and delete it. Do this only for your own patrons' requests!