

CEFLS Horizon Procedures

Step By Step – Interlibrary Loan with Horizon

When patrons ask for books or other materials that are not immediately available in your library, you can use Horizon to speed up the process of satisfying those requests.

Horizon requests stay in the system, waiting for an item to be checked in to fill the patron's request. If the item is at one of the CEF automated libraries and if it's not in a protected item type (only requestable by the library's own patrons) then you have a good chance of getting it.

We recommend that you **first try Horizon for your patrons' requests, then use DueNorth** if the item is not available at one of the CEF automated libraries. For libraries that also use OCLC, the process described below works the same for items sent and received through that system.

DO NOT SEND DueNorth REQUESTS TO AUTOMATED LIBRARIES IN CEF! This includes most CEF libraries (currently Crown Point is the only exception).

If you do receive items through DueNorth, you should use Horizon to check them out to your patrons. If you send out DueNorth requests to other libraries, use Horizon to check the items out to those libraries.

How to check out DueNorth requests on Horizon:

When you request an item for your patron, follow this procedure:

1. Do the normal DueNorth process to request and receive the item.
2. When the patron comes to get the item, you must create a Fast-Add in Circulation – see the Step by Step instructions for Brief MARC Records and Fast-Adds.
3. Give the item a title that could be used to search if the paperwork is lost.
4. Use ILLFAB for the collection code.
5. Use ill for the item type.
6. Most libraries use a barcode on a card that can be put in a pocket or paper-clipped into the book. They reuse the card on another ILL or fast-add as needed.
7. When you have checked the item out to the patron, you can edit the due date if necessary to make sure the item is returned to the loaning library on time.
8. When the item is returned, scan the barcode on the card in the Check In window to check it in. If the barcode is lost, search the title using f2, locate the item, and use f10 to "send it" to Check in.
9. The fast-add record is deleted on check-in, freeing the barcode for another use, and keeping the catalog clean. You will also have statistics that help you count ILLs.
10. Do the normal DueNorth process to return the item to the loaning library.

When you fill a DueNorth request from another library, follow this procedure:

1. Do the normal DueNorth process to inform the borrowing library you will fill the request.
2. Create a borrower record for the borrowing library. You will often be able to copy another library's borrower record. For example, if you search for a borrower "Potsdam Public Library" using f4 (with the Checkout window open), you will find numerous instances of this library. Choose one by highlighting it with the mouse and clicking OK. **However – DO NOT USE this borrower unless it has your location and borrower type. You need to copy it if it belongs to another library. You'll do that in the next step.**
3. With the library in the CKO window, click on the Borrower menu at the top of the screen and click on **Duplicate Borrower**.
4. In the patron form, change the location to your 3-letter code, and change the borrower type to your ill borrower type.
5. It is not necessary to use a patron card – the record does not require a barcode. It can be just the location, library name and borrower type.
6. Save the new patron record.
7. With the new patron in the window, check out your ILL book and send it to the borrowing library.
8. When the book returns, check in the book in Horizon.
9. If the book becomes overdue, you will have overdue notices you can use to contact the borrowing library.