

CEFLS Horizon Procedures

Step By Step – Overdue Notices with Email

Before using email, have the CEF Automation Department set up some things in Horizon. You will also need a free program called JTMail on your computer. It is available for download at www.jtdata.com.

1. Log in to Horizon, if you have not already.
2. Open the Circulation Folder on the left.
3. Double Click on “Circulation Reports.”
4. In the window that opens, click on the Notices menu, and choose Notice Output.
5. A list of notices that have already been generated appears.
6. Click on New Batch in the lower right corner.
7. Click on Auto Notice. Highlight your location, and click OK.
8. A window shows progress as the notices are created
9. When the process finishes, a new batch for your library appears at the bottom of the list. Highlight that batch, if it isn’t already highlighted.
10. Click Output. (The first time requires some printer setup).
11. Click OK to print. Choose the printer and print the printed notices.
12. If you have any borrowers with the “notice by email” option in their record, and they have notices, a dialog box comes up to Save Email File. In the window, click on mailfile.txt. Click OK to overwrite.
13. Purge your old notices (highlight and click purge) if you have more than 2 in the window. After this you can close the Notices and Circulation Reports windows.
14. The printed notices can be folded and mailed using a window envelope, or you can use the notices as a way to call patrons.
15. For the email notices, open the JTMail program and click Send to send the file created by the autonotice process. (See the back of this sheet if you need to edit them first.) That’s it! You are done.
16. The batch can be printed again if needed by clicking Output again, and can be emailed again using JTMail – Send (until the file is overwritten next time you run overdues)
17. On the next day you run overdues, you should generate a new batch, following steps 1-14 above.
18. After you have several batches showing in the window for your library, you should purge the older ones by highlighting them and clicking Purge.
19. If you every want to see who will be getting notices and print them selectively, you can use the Select button. Some libraries print the notices to a file to save paper. Ask Betsy if you want to set this up.

Sending Email Notices with JTMail

1. Following the procedure above, create the file C:\mailfile.txt.
2. Minimize Horizon and open JTMail.
3. Optional: To check the content of your notices, click the “ASCII-2-Text” button, then click Edit (next to the MailFile button near the top left). You can edit notices, but be sure to leave the codes in place, and if you delete an entire notice, delete the complete notice, including the beginning and ending codes. When finished editing, save and close the file, then click the “Text-2-ASCII” button.
4. Click “Send Mail”