

## **CEFLS Horizon Procedures**

### **Step By Step – Managing the Request Pull List**

Do this procedure **every day** your library is open.

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 Requests menu, and choose Request Pull List.
5. The Request Pull List takes a few minutes to load.
6. Click the Sort button at the bottom of the screen to sort the list, and choose Call Number.
7. Click the File menu at the top left and choose Print.
8. Say “OK” to the message.
9. You can close the pull list and answer YES to the message, and then close the Circ Reports.
10. Retrieve the books on the list from your shelves.
11. Check **IN** each book you found. Messages will tell you where each book should go. Have some transit slips handy, and write the destination library, your library, the date and put a check mark where it says Horizon ILL.
12. For books you did not find, you now need to take one of the following actions
  - a. Search the book in Horizon – use f2. Send it to the copy/item list (f10) and edit the record. Change the item status to “trace”. OR
  - b. Search the book in Horizon – use f2. Send it to the copy/item list (f10) and change the item type to one of the protected types we have set up for your library, if any. Ask CEFLS Automation Department if you don’t know what these are.
13. After dealing with all of the items, and putting any books you found in the delivery area for the van pickup or on your own hold shelf, you are done.

Please do not neglect the pull list – requests can get stuck and not filled by any library if you do not keep up with it.