

# Recommended Horizon Routines for CEFLS Libraries

## Daily

- Run Overdues and send or call
- Check Request Pull List
- Check hold shelf (under requests menu in circ reports) for expired items – check them in. Avoid checking out expired items, as this causes “stuck” blocks. If a patron comes to get an expired hold shelf item, check it in first, then check it out to the patron.
- Contact patrons whose holds have come in
- Check DueNorth for any requests your library could fill.

## Weekly

- Delete requests on the Dead End Request report. Try DueNorth or contact the patron.

## Monthly

- Print monthly statistics if you report these to your board (Ad Hoc Reports – Monthly Overview and Monthly Circ Details). Do this after the first week of the month.
- Print lists of new titles for the desk and local news outlets - use item group editor or item report
- Check your patrons’ requests in Circ Reports – All Requests. See if any are taking too long and might be better placed on a different bib record or are possible purchase items.
- Remove some titles from “new” item type categories to release them to fill requests outside your library.

## Quarterly

- Send bills to patrons with lost items after checking shelves. Use Reminder Notice or the final notice. Keep a file of bills sent.
- Check to see if checked in items are “staff only” and uncheck the box, using item group editor.

## Yearly

- Purge inactive patrons. This is done with CEFLS’s help – decide how you want to define inactive, such as expired over 1 year with no books out or money owed. Can review borrower list report to see how many that would be. When you have decided on the definition, ask CEFLS to purge them.
- Inventory part of collection (if possible a quarter to a third). Use a laptop, or use printed lists sorted by call number from item report.
- Delete missing, missing inventory, and trace items which have been in those statuses for over a year, using item group editor to find them and change status to w. If desired, print lists first and look for them on shelves.

- Delete your in-transit items that have been in transit over a year: first check them in as “damaged”, then withdraw them.
- Change holidays in Horizon – use Holidays in Administration menu.
- After the first week of the new year, print statistical reports for Annual Report –Monthly Circulation Details and Collection Snapshot, using a date of 12/31/yy