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Circulation Setup Guide

This guide explains the tasks you need to do to set up Horizon Circulation so that it follows your library’s circulation policies.
About Circulation Setup

Welcome to the Circulation Setup Guide. This guide explains the tasks you need to do to configure Horizon so that it handles your library’s automated circulation tasks according to your library policies. Once you set up Circulation, you can use Horizon for all your circulation tasks.

About This Guide

The Circulation Setup Guide is for administrators of Horizon Circulation. It explains setup tasks that you can do to let Horizon handle your circulation workflow more easily. Horizon comes with defaults so that you can use it without further setup; however, depending on your library policies and procedures, you may want to customize your Horizon software.

In this guide, tasks do not always have step-by-step instructions on how to access specific views. Instead, a cell at the beginning of each task shows you the name of the view in the Table Editor, and where the process is located on the navigation bar. Here is an example:

<table>
<thead>
<tr>
<th>View:</th>
<th>type Administration\Table Editor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process:</td>
<td>Administration\Table Editor</td>
</tr>
</tbody>
</table>

The process shows the default folders on the navigation bar where you can find the view. If no process is listed, use the Table Editor to access the view. Your folders may display differently depending on your library’s setup.

(For more information on accessing views, see “Opening a View in the Table Editor” in the “Getting Started” chapter of the System Administration Guide.)

These are the main circulation-related categories that you set up in Horizon:

- **Item circulation types (ITYPEs) and ITYPE groups.** An ITYPE defines policies that apply to specific types of items at your library. These include settings such as fine minimums and maximums. Individual items are assigned to ITYPEs.
  
  You can group ITYPEs with similar circulation requirements so that your circulation privileges and parameters are easier to set up. Then you can choose whether the default circulation policies that you set up should apply to the ITYPE groups in your system. (For more information on groups, see “Creating or Editing Groups to Define Circulation Privileges and Parameters” on page S-52.)

- **Borrower circulation types (BTYPEs) and BTYPE groups.** A BTYPE defines policies that apply to specific types of borrowers that use your library. These include settings such as how long a library card is valid. You can also use them to set maximums for the number of lost items, overdues, and unpaid fines specific types of borrowers can have and still check out items. Individual borrowers are assigned to BTYPEs.
  
  You can group BTYPEs with similar circulation requirements in the same way that you group ITYPEs.

- **Circulation privileges.** Circulation privileges set up the rules for circulating items that apply to the location that houses the items. You can set up a different set of privileges and exceptions for each location in your library.
About Circulation Setup

- **Circulation parameters.** Circulation parameters define loan, request, and recall limitations. They can also further define certain kinds of notices, fines, and fees. Different parameters can apply to locations, ITYPEs, or BTYPEs.

**IMPORTANT**

You should define ITYPEs, BTYPES, ITYPE groups, BTYPES groups, locations, and location groups before you import data or set up other parts of Circulation. (A location can be a branch, department, or any other segment of your library that you define. You can group locations with similar circulation requirements in the same way that you group ITYPEs and BTYPES.) (For more information on locations, see “Library Locations” in the “General Setup” chapter of the *System Administration Guide* and “Creating or Editing Groups to Define Circulation Privileges and Parameters” on page S-52.)

You can also set up Horizon to send notices and invoices to borrowers, and to print circulation slips. If your library is a member of a consortium, Horizon can help you share a borrower database or coordinate borrower information.

Once you have set up Horizon Circulation correctly, ITYPE and BTYPES groups interact with circulation privileges, circulation parameters, location group parameters, and other settings to determine loan periods, due dates, overdue dates and fines, and other necessary circulation functions.

When you first installed Circulation, you may have set up Horizon to perform all your circulation tasks according to your library policies. However, if your library policies change for any reason, you can edit your Circulation setup at any time.

**IMPORTANT**

Since Horizon Information Portal provides the programs used in Horizon request placement and processing, you need to restart HIP's JBoss after making any changes in Horizon circulation parameters. You can do this by clicking the Restart JBOSS button at the bottom of the main Setup or main Customize page in the HIP Admin tool.

**NOTE**

This guide assumes that you know how to use the Table Editor. (For more information, see “Horizon Table Editor” in the “Getting Started” chapter of the *System Administration Guide.*

Whenever you make a change to Horizon setup, you should exit Horizon and restart it on all workstations where you want the change to take effect.
This guide explains these topics:

- **About Circulation Setup.** This section gives an overview of this guide and explains the parts of Horizon Circulation that you can set up.
- **Preparing Horizon to Work with Item Records.** This section explains setup tasks you can do so that Horizon can use database information about the items in your library.
- **Preparing Horizon to Work with Borrower Records.** This section explains setup tasks you can do so that Horizon can use database information about the borrowers that use your library.
- **Setting Up Circulation Privileges and Parameters.** Circulation privileges and parameters govern the circulation of items for each location in your library. This section describes the basic steps that apply to setting up every circulation privilege and parameter. Steps that are specific to each privilege or parameter are explained in specific tasks. You should set up circulation privileges for each location group that you use in Horizon.
- **Setting Up or Editing Basic Circulation Policies.** This section includes details on how to allow loans, set due dates, and set up fines.
- **Setting Up Self-Serve Checkout.** If you want to, you can set up a workstation that borrowers can use to check out library items to themselves. This section explains how to set up Self-Serve Checkout so that borrowers must enter a borrower barcode for each item they check out. It also explains how to set the time that Self-Serve waits before requiring entry of a borrower barcode.
- **Setting Up Borrower Self-Registration for Use with Information Portal.** This section explains how to set up Horizon to allow borrowers to self-register for temporary barcodes.
- **Setting Up Blocks.** This section discusses the general categories of blocks and explains how to edit blocks and block messages. It also explains how to display blocks from other locations.
- **Tracking a Cash Transaction.** This section explains the information about payments from borrowers that Horizon can record.
- **Setting Renewal Rules.** This section explains how to set up Horizon to handle renewing checked-out items based on your library preferences.
- **Setting Up Hold Requests.** This section includes information about prioritizing hold requests, setting the maximum number of requests, using loan overrides, and using transit holds.
- **Setting Up Advanced Booking.** This section includes information about setting up Advanced Booking. Advanced Booking lets borrowers reserve library materials for a specific date and time if the materials are housed in the library’s closed stacks.
- **Setting Recall Rules.** This section explains item recall. It also explains how to edit recall reasons and give locations the right to recall items.
- **Setting Up a Single Circulation Station for Multiple Locations.** You can set up one central workstation to circulate all collections in one physical location.
- **Setting Up or Editing Closed Stack Access Parameters.** If you use Closed Stack Access, you need to set up these circulation parameters.
- **Defining Notices, Invoices, and Reminders.** This section explains the different kinds of mailings you can send to borrowers. It also explains how to set up telephone and e-mail notification.
- **Using Circulation Slips and Receipts.** This section explains how to use customer receipts and staff workslips to help track circulation transactions.
• **Changing Circulation Display Options.** You can choose to display the borrower barcode at checkout or the borrower name when a damaged item is checked in. You can also choose whether to display “lost” or “claimed returned” items.

• **Setting Up Time Periods for Gathering Bib Usage Statistics.** Library staff can view the usage of library items from individual bibliographic records, but only after you set up the time periods for gathering bibliographic usage statistics.

• **Sharing Borrower Information in a Consortium.** If you are a member of a consortium, you can choose to share borrower information. This section explains Horizon’s methods for sharing borrower information.

• **Setting Up Homerooms for Borrowers.** If you are a school library, you can set up homeroom codes (representing a teacher’s name or room number) to assign to each borrower. This lets your staff know the homeroom of each borrower.

• **Setting Up the Newly Acquired Items List (New Additions) (HIP 4.0 Sites).** (Only available for HIP 4.x sites) Horizon Information Portal 4.0 lets you display a list of newly acquired items for your library patrons. You control this list by settings you specify in the Horizon database.

• **Setting Up E-mail Alerts for Newly Acquired Items (New Additions) (HIP 4.0).** (Only available for HIP 4.x sites) Horizon Information Portal 4.0 lets you send e-mail alerts to borrowers whenever you acquire new items with authority headings in which they have interest.

• **Setting Up the Top Circulating Items List (HIP 4.0).** Libraries who have chosen to implement HIP 4.0 and higher have the ability for staff or borrowers to display a list of top circulating items in Horizon Information Portal.

---

**Preparing Horizon to Work with Item Records**

Each item that circulates from your library must be represented by information in your library’s database. This information is stored in four kinds of records: bibliographic (bib) records, authority records, item records, and copy records. Each record contains different kinds of information. You set up Horizon so that it can retrieve the necessary information during circulation tasks. You create ITYPEs and ITYPE groups and assign circulatable items to these groups to manage circulation.

Horizon assigns a circulation status to each item record. (For example, an item can have a status of “checked in,” “checked out,” “lost,” or “on order.”) Horizon comes with some item statuses. You can edit these statuses. You can also add, delete, and edit your own item statuses.

Occasionally your library may need to circulate an item that catalogers have not yet entered into your library database. If circulation staff needs to quickly add an item record at the circulation desk, you can specify the fields that circulation staff must include in the added record.

This section explains these topics:

• Defining an Item Circulation Type (ITYPE)
• Working with Item Statuses
• Choosing and Requiring Fields for Item Records
• Requiring Fields for Fast-Added Item Records
Defining an Item Circulation Type (ITYPE)

Item circulation types (ITYPEs) determine general policies for specific groups of items held by a library. (For example, you can have an ITYPE for books and another ITYPE for DVDs. Each ITYPE would have different policies.) ITYPE policies include fine minimums and maximums. They also determine the length of time that Horizon should keep each item’s circulation history.

Because many types of items can share the same circulation rules, you do not need to create an ITYPE for every category of item on your system. (For example, you may have a collection of paperback books that you keep separate from the main collection. However, if the main collection and the paperbacks both have exactly the same circulation rules, you need to create only one ITYPE code and use it for both collections.)

When you set up a new ITYPE code, Horizon creates an ITYPE group that contains only that code. You can also choose to create your own ITYPE groups that contain multiple ITYPE codes. This lets you apply circulation privileges and parameters to more than one ITYPE at a time. (For more information on groups, see “Creating or Editing Groups to Define Circulation Privileges and Parameters” on page S-52. For more information on circulation parameters, see “Setting Up Circulation Privileges and Parameters” on page S-51.)

You can create and modify ITYPEs and ITYPE groups whenever you need to. However, you should create most ITYPEs and ITYPE groups before you load or create item records so that you can assign appropriate ITYPE codes to the item records when you load or create them.

**IMPORTANT**

You should define ITYPEs and ITYPE groups before you set up circulation privileges and parameters.

You can delete an ITYPE if no items are assigned to that ITYPE. If items are assigned to an ITYPE that you want to delete, you must reassign those items to another ITYPE before you can delete the ITYPE. You can delete ITYPE groups that you create. You should only delete an ITYPE group if you have first deleted all the ITYPEs contained in that ITYPE group.

**Before You Begin**

You may want to read “Setting Up Fines, Fees, and Suspensions” on page S-71 so that you can better make decisions about ITYPE setup.
To define an item circulation type (ITYPE)

**View:**  itype

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITYPE Code</td>
<td>Enter a code that identifies the item circulation type (ITYPE). (For example, enter “BK” for books or “1day” for one day reserve items.) Codes can contain up to seven characters and should be unique. Horizon uses this same code for the corresponding ITYPE group it automatically creates from the ITYPE setup. Whenever you want to link to a certain set of ITYPE parameters (such as when catalogers create item records or you define circulation exceptions), you use the ITYPE group code.</td>
</tr>
<tr>
<td>No. of Items</td>
<td>This is a read-only field that displays the number of item records that link to this ITYPE. Horizon updates this field automatically.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the ITYPE. (For example, enter “Books” or “1 Day Reserve”.) This description should be unique and may help identify the circulation rules that you want to apply to this ITYPE.</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>--------------</td>
<td>---------</td>
</tr>
</tbody>
</table>
| **Group Charge** | If you want to group items in this ITYPE so that borrowers can check out several items (such as pamphlets and pictures) under a single barcode, mark this box.  

**NOTE**  
If this box is marked, whenever items with this ITYPE are checked out a prompt will display for entering the number of pieces associated with this item. When the item is checked in, if the number of pieces is greater than one, another prompt will display to enter the number of pieces. If the number of checked in pieces does not equal the number of checked out pieces, an error message will display.  
For statistical purposes, Horizon 7.3.2 and later versions will count each piece as a circulation transaction. For instance, if an item with ten pieces is checked out, this will count as ten checkouts. |
| **Minimum Fine** | If you want to charge a minimum fine for an overdue item of this ITYPE, enter the minimum fine amount that you want to charge.  

Enter the amount in this format, where N represents a numeric digit: “N.NN”. (For example, enter “0.25” to charge 25 cents.)  
If you enter a minimum fine, Horizon charges that amount on the first day fines should be assessed for this ITYPE. The fine remains at the minimum until the daily fine amount that you specified for this ITYPE would equal the minimum fine amount. Then the fine amount increases by the daily fine amount. If you use a grace period, your settings affect when Horizon first charges the minimum fine. (For instructions on specifying a grace period, see “Setting Up a Grace Period” on page S-75. For instructions on specifying a fine amount, see “Setting Up Fines” on page S-72.)  
If you want to have fines computed in assigned increments without imposing a minimum fine, leave the Minimum Fine field blank.  
(For more information, see “Understanding Minimum and Maximum Fines” on page S-74.) |
| **Fixed Max. Fine** | If you want to keep fines on any item from increasing beyond a maximum amount, mark this box and enter a maximum fine amount in the next field. Do not enter a percentage in the -OR- Percentage field.  
If you want to limit maximum fines by a percentage of the item cost, use the -OR- Percentage field instead. |
### Preparing Horizon to Work with Item Records

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max. Fine Amount</td>
<td>If you marked the Fixed Max. Fine box, enter the maximum fine amount for an item. Enter the fine amount in this format, where N represents a numeric digit: “N.NN” (for example, “10.00”). (For more information, see “Understanding Minimum and Maximum Fines” on page S-74.)</td>
</tr>
<tr>
<td>-OR- Percentage</td>
<td>If you want to keep fines on any item from increasing beyond a percentage of the item cost, enter the percentage. (For example, enter “70” if you want fines to go no higher than 70% of the item cost.) Horizon checks for the item cost in the item record first. If no item cost is listed in the item record, Horizon finds the average replacement cost for the collection that includes this item in the collection view. Then Horizon applies this percentage to that average replacement cost. (For more information, see “Collections” in the “General ‘Setup” chapter of the <em>System Administrator Guide</em>.) If you enter a percentage, do not mark the Fixed Max. Fine box and do not enter a maximum fine amount.</td>
</tr>
<tr>
<td>Keep Circ. History (days)</td>
<td>Enter the number of days for which Horizon should keep information about the borrowers who check out items of this ITYPE. After this number of days, Day End deletes the history.</td>
</tr>
<tr>
<td>Bookable</td>
<td>If your library uses Advanced Booking and you want to make items of this type available to book in advance, mark this box.</td>
</tr>
</tbody>
</table>
| Take Overnight? (hourlies)    | **NOTE** If your library uses Horizon Media Scheduling or Advanced Booking, this option applies to items whose hourly due time may extend past the closing time of the library. Do one of these options:  
  - If you want to let borrowers keep an item that would be due after closing until the next time the library is open, mark this box.  
  - If hourly items must be returned before closing regardless of the hourly rate, do not mark this box. |
| Media Type (self check)       | If your library uses 3M SelfCheck, enter or choose the code for a self-serve checkout media type. (For more information on self-serve checkout media types, see the *3M SelfCheck Guide*.) |
Working with Item Statuses

Item statuses designate the circulation status of every item that has a corresponding item record in Horizon. (For example, a status of “i” means that an item is currently checked in. A status of “m” means that an item is missing from the library.) Horizon comes with several default status codes that can be automatically or manually assigned to items. You cannot delete these default codes, but you can modify their descriptions and define how they are used for requestable items and inventory. You can also create, edit, and delete new status codes of your own.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Security Marker (self check) | If your library uses 3M SelfCheck, enter or choose the code for the type of security marker you use on items with this ITYPE.  
(For more information about security markers, see the 3M SelfCheck Guide.) |

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Stats Only    | Mark this box when you want items assigned to this itype to be “checked out” only for the current session and then immediately checked back in. 
This is typically used to track usage of items that the library may or may not want back, such as pamphlets given to patrons or “throwaway” paperbacks. 
When these items are checked out through circulation, they get a due date slip and they appear in the All Items Out window for the current session, but they are never really checked out to patrons. |
Horizon assigns item statuses in two ways:

<table>
<thead>
<tr>
<th>Method of assigning Item Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatically</td>
<td>Horizon assigns an item status when specific system functions are performed.</td>
</tr>
<tr>
<td></td>
<td>(For example, when an item is checked out, Horizon assigns the status “Checked Out.” When an item has held the status of “Lost” for a specified number of days, the status changes to “Missing.”)</td>
</tr>
<tr>
<td>Manually</td>
<td>Staff can manually assign or change an item’s status in Circulation.</td>
</tr>
<tr>
<td></td>
<td>(For example, staff can assign a status of “Lost” or “Claimed Returned.”) (For more information, see “Placing a Claimed Returned or Lost Item Block” in the “Blocks” chapter or “Changing Item Statuses” in the “Borrower and Item Records” chapter of the Circulation Guide.)</td>
</tr>
<tr>
<td></td>
<td>Staff can also edit the item record in Cataloging to change the status. (For more information, see “Changing a Bib or Authority Record’s Status” in the “Control Records” chapter of the Cataloging Guide.)</td>
</tr>
</tbody>
</table>

*WARNING*

Do not use SQL to change an item status. This can corrupt your database. (For example, changing an item status from “o” to “i” leaves unlinked data in the circ table, rows in the recall table, and borrower blocks unresolved. It also ignores pending requests and bypasses any fine calculations.) If you change the status using the Item Group Editor or by editing the item record in the MARC Editor, Horizon checks to make sure that the status change you want to make has no negative results.

An item status also determines things such as whether the item can be requested or fill a request, whether the item can be placed on reserve, and whether remote borrowers can find the item during a search or place a hold on the item. You can set some item statuses to change automatically from one to another after a certain length of time. (For example, you can set a “Lost” status to change to “Missing” after 365 days.) You can also set up Horizon to automatically suppress the display of items with “Lost,” “Claimed Returned,” or “Missing” statuses so that the items display only in staff searching.

This section explains these topics:

- Defining or Editing an Item Status
- Setting a Status to Change Automatically
- Allowing Renewals on Items with ‘Lost,’ ‘Lost Recall,’ or ‘Claimed Returned’ Statuses
- Automatically Suppressing Items from Public Searches
Defining or Editing an Item Status

You can create and edit your own item statuses that staff can assign manually. You can edit a Horizon-defined status so that items with that particular status can be requested or placed on hold. You can also edit an item status to identify that you want items with that status reported as exceptions during inventory.

To define or edit an item status

1. Open the item_status view in the Table Editor.
2. Choose the item status that you want to change, or create a new item status.
   Horizon displays the Edit Item Status window:

   ![Edit Item Status Window]

   If the item status is Horizon-defined, do not change the code in the Item Status field.

3. Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Status</td>
<td>Enter the code that identifies the item status. If this item status displays “Yes” in the Horizon-defined field, do not change the code.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the status. Even if this is a Horizon-defined status, you can edit this description.</td>
</tr>
</tbody>
</table>
### In this field | Do this
--- | ---
**Available for Request?** | If borrowers can request items with this status, mark this box.  
(For example, mark this box for items with a status of “Checked Out” to make them available for requests. In another example, if you do not want to let borrowers make requests for items that are on the shelf, clear this box for items with a status of “Checked In” to make them unavailable for requests.)  
**NOTE**  
If you are a member of a consortium, clearing this box keeps borrowers from making requests from other member libraries.

**Fill a Request?** | If items with the status can fill a request, mark this box.  
(For example, mark this box for items with a status of “Checked In” to make them available to fill a request. In another example, clear the box for items with a status of “Checked Out” or “Bindery” since they would not be available to fill a request.)

**Horizon-defined** | This is a read-only field that specifies whether the status is a system default. If it is, you cannot delete the status.

**No. of items** | This is a read-only field that displays the number of items currently assigned to this status.  
Horizon updates this field automatically.

**Reserve?** | If you have Reserve Bookroom and borrowers can place items with this status on reserve, mark this box.

**Booking?** | If you use Advanced Booking and borrowers can book items with this status in advance, mark this box.

**Z39.50 Available** | If items with this status will be shown as available to borrowers searching with Z39.50, mark this box.

**Z39.50 On Hold** | If borrowers searching with Z39.50 can place items with this status on hold, mark this box.
## Working with Item Statuses

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory Action</td>
<td>Mark whether you want Horizon to report inventory exceptions for items with this status when you scan their barcodes during inventory. By default, Horizon reports inventory exceptions for all item statuses except “i” (Checked In) or “s” (Shelving Cart). (For more information, see “Choosing Whether to Report Items as Exceptions” in the “Inventory Setup” chapter of the Inventory Guide.)</td>
</tr>
<tr>
<td>CSA Req?</td>
<td>If you use Closed Stack Access and items with this status can be requested through Closed Stack Access, mark this box.</td>
</tr>
</tbody>
</table>

4. Click **Page Down**.

   Horizon displays the second page of the Edit Item Status window:

   ![Edit Item Status](attachment:image_url)

5. Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track Cataloging?</td>
<td>Select this option to have the system track how long newly acquired items take to get cataloged.</td>
</tr>
<tr>
<td>Pull List?</td>
<td>Select this option to include this item_status on the pull list. For example, if a site wants to have the shelving cart or display item_status display on the pull list, those status’ need to have this value checked.</td>
</tr>
</tbody>
</table>
Preparation of Horizon to work with Item Records

6 Save your changes.

Setting a Status to Change Automatically

You can set some item statuses to change automatically to another status after a specified number of days. This lets you automate some maintenance tasks to keep certain statuses more current. You can also change the default status for items that your staff checks in using the Damaged Checkin mode.

To set a status to change automatically

1 Open the location view in the Table Editor.
2 Display these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Track First Availability?     | Select his option to have the system track how long newly acquired items take to become available for circulation.  
This feature lets you use Information Portal to send automatic patron alerts that a patron requests. Horizon recognizes that a newly acquired item is available when the item status changes to a designated status. (For example, you might want to track the first availability of items when Horizon assigns an item an “In” or “Shelving Cart” item status.)  
You specify those item statuses for which you want Horizon to track availability.  |

These fields control some of the automatic status changes.
3 Complete or update one or more of these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Lost to Missing (days)                  | Enter the number of days that you want an item to keep its “Lost” status before the status automatically changes to “Missing.”  

**IMPORTANT**

Changing the status from “Lost” to “Missing” breaks the link between the item and the borrower who lost it. The lost item stays in the burb table and on the borrower’s list of items out until the lost item is checked in, but the borrower ID is no longer stored on the item record.  
To keep the link, you must enter information in the Days History field for the Lost block type before the item is declared lost. This lets Horizon keep the Lost block in history after the block is resolved (for example, after the item is paid for). (For instructions on setting up blocks, see “Setting Up Blocks” on page S-86.) |
| Claimed Ret. to Missing (days)          | Enter the number of days that you want an item to keep its “Claimed Returned” status before the status automatically changes to “Missing.”  

**IMPORTANT**

Changing the status from “Claimed Returned” to “Missing” lets Horizon delete the circulation history that ties the “Claimed Returned” status to the borrower. |
| On Reshelving Cart (days)               | Enter the number of days you want an item to keep its “On Reshelving Cart” status before the status automatically changes to “Checked In.”  

Enter “0” (zero) if you want the checked-in items to take the status of “Checked In” immediately instead of first having the “On Reshelving Cart” status. |
4 Display the **Damaged-Cki** field:

![Diagram of the Damaged-Cki field](image)

Use this field to change the status of damaged items at checkin.

5 Enter or choose the code for the status that you want Horizon to assign to items that are checked in using the Damaged Checkin mode.
   If you leave this field blank, Horizon uses the “Damaged” status.

6 Page down as necessary to display the **Overdue to Lost (days)** field.

7 Enter the number of days after which an item is set as Overdue that Horizon will automatically set the item status to Lost.
   This must be a non-zero value.

**Allowing Renewals on Items with ‘Lost,’ ‘Lost Recall,’ or ‘Claimed Returned’ Statuses**

You can choose whether users can renew items with ‘Lost,’ ‘Lost Recall,’ or ‘Claimed Returned’ statuses. Horizon comes with this functionality turned on.

If a staff member renews an item with one of these statuses, Horizon also resolves any Lost or Claimed Returned blocks. Staff can renew items with these statuses from either Checkout or Checkin.

---

**NOTE**

Horizon renews an item with a ‘Lost,’ ‘Lost Recall,’ or ‘Claimed Returned’ status only if library staff confirm that the item is present at the time of renewal.
To allow renewals on items with ‘Lost,’ ‘Lost Recall,’ or ‘Claimed Returned’ statuses

1. Open the Location view in the Table Editor.
2. Click Page Down or resize the window to display the Allow Renew of Lost and Claimed Return field:

![Location view screenshot](image)

3. Mark the Allow Renew of Lost and Claimed Return field.
4. Save your changes.

Automatically Suppressing Items from Public Searches

If your PAC searches are set up as public only, you can set up Horizon to automatically suppress the display of items with “Lost,” “Claimed Returned,” or “Missing” statuses. Instead of displaying in your PAC, the items display only in staff searching. This can lower borrowers’ frustration because they will not see specific items in your PAC that they cannot check out or request. (For help in setting up public-only indexes, contact SirsiDynix support. There may be an additional charge for this service.)

You can specify the number of days that an item with a “Lost,” “Claimed Returned,” or “Missing” status displays in your PAC before Horizon automatically changes the setting to display only in staff searching. (Horizon changes the status during the Age Item Status process in Day End.) You can also change the display option manually at any time. (For instructions on changing the display manually, see “Specifying a Record for Staff Use Only” in the “Control Records” chapter of the Cataloging Guide.)

The change in status to “Missing” and the change to display only in staff searching can affect each other.
For example, if the length of time assigned before an item goes from “Lost” or “Claimed Returned” to staff only display is longer than the length of time assigned before an item goes from “Lost” or “Claimed Returned” to “Missing,” Horizon sets the item status to “Missing.” Horizon then follows the timetable that sets a “Missing” status to display only in staff searching. This table illustrates this concept:

<table>
<thead>
<tr>
<th>Item is two weeks overdue</th>
<th>Item is three weeks overdue</th>
<th>Item is four weeks overdue</th>
<th>Item is six weeks overdue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library declares item claimed returned at borrower’s request</td>
<td>Library declares item lost</td>
<td>Library declares lost or claimed returned item missing Missing item displays only in staff searching</td>
<td>Lost and claimed returned item displays only in staff searching</td>
</tr>
</tbody>
</table>

To automatically suppress items from public searches

1. Open the location view in the Table Editor.
2. Display the Staff Only fields:

   ![Image of Edit Location Parameters window]

   Use these fields to specify the length of time that you want items to keep a specific status before items with that status no longer display in your PAC.
Choosing and Requiring Fields for Item Records

You can choose the columns that you want to display as fields on item records.

To choose or require fields for item records

1. Open the `mq_view` view in the Table Editor, or start the View Control process. The default location of this process is the Administration\System Setup folder on the navigation bar.
   Horizon opens the List Search window.
2. Enter “item” in the Search for field. Horizon opens a List Horizon View window.
3. Double-click item. Horizon opens an Edit Horizon View window.

---

3. Complete or update these fields:

<table>
<thead>
<tr>
<th>In one or more of these fields</th>
<th>Do one of these options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lost to Staff Only (days)</td>
<td>• Enter the number of days that you want items to keep the indicated status before items with that status no longer display in your PAC.</td>
</tr>
<tr>
<td>Claimed Return to Staff Only (days)</td>
<td>• Enter “1” (one) if you want items to display to staff only after the next time Day End processes run.</td>
</tr>
<tr>
<td>Missing to Staff Only (days)</td>
<td>• Enter “0” (zero) if you want items to always display in your PAC.</td>
</tr>
</tbody>
</table>

4. Save your changes.

5. If you want to, you can view the number of items whose status has changed to staff only display in the Day End Activity Log. For instructions, see “Monitoring the Day End Activity Log” in the “Maintenance and Day End” chapter of the System Administration Guide.

---

Choosing and Requiring Fields for Item Records

You can choose the columns that you want to display as fields on item records.

To choose or require fields for item records

1. Open the `mq_view` view in the Table Editor, or start the View Control process. The default location of this process is the Administration\System Setup folder on the navigation bar.
   Horizon opens the List Search window.
2. Enter “item” in the Search for field. Horizon opens a List Horizon View window.
3. Double-click item. Horizon opens an Edit Horizon View window.

---

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4 Display the Edit View group:

5 If you want to, add any columns that you want to display as fields on an item record. (For more information, see “Adding a Column to a Search List View or Edit Window” in the “Introduction to Horizon Views” chapter of the System Administration Guide.)

6 Mark the **Required** box for each column in the Edit View group that library staff must complete as part of an item record. (For a list of default columns and columns that you can require, see “Default Fields on Item Records” on page S-23.)

7 Save your changes.

---

**Requiring Fields for Fast-Added Item Records**

Your library may want to let borrowers check out items that your library owns but that have not yet been added to your database. (For example, you may want to circulate an item that has not yet been fully processed.) Library staff can enter enough information in a “fast-added” record to identify these items before the items circulate. Library staff can complete or delete these fast-added records later. You can choose which item record fields must contain information before library staff saves the fast-added item record and circulates the item.

**To require fields for fast-added item records**

1 Open the **mq_view** view in the Table Editor, or start the **View Control** process. The default location of this process is the Administration\System Setup folder on the navigation bar.

   Horizon opens the List Search window.

2 Enter “item_fast_add” in the **Search for** field.

   Horizon opens a List Horizon View window.

3 Double-click **item_fast_add**.

   Horizon opens an Edit Horizon View window.
4 Display the Edit View group:

5 If you want to, add any columns that you want to require as fields on a fast-added item record.

(For more information, see “Adding a Column to a Search List View or Edit Window” in the “Introduction to Horizon Views” chapter of the System Administration Guide.)

6 Mark the Required box for each column in the Edit View group that library staff must complete as part of a fast-added item record.

(For a list of default columns and columns that you can require, see “Default Fields on Item Records”.)

7 Save your changes.

### Default Fields on Item Records

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Column Name</th>
<th>Description</th>
<th>Default on fast-added record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item #</td>
<td>item#</td>
<td>Unique identifier, system-assigned</td>
<td></td>
</tr>
<tr>
<td>Copy #</td>
<td>copy#</td>
<td>Unique identifier, system-assigned</td>
<td></td>
</tr>
<tr>
<td>Item barcode</td>
<td>ibarcode</td>
<td>Barcode of item</td>
<td>X</td>
</tr>
<tr>
<td>Location</td>
<td>location</td>
<td>Location of item (in code form, such as PR for Provo)</td>
<td>X</td>
</tr>
<tr>
<td>Collection</td>
<td>collection</td>
<td>Item’s collection (in code form, such as FIC for fiction)</td>
<td>X</td>
</tr>
<tr>
<td>Item Type</td>
<td>itype</td>
<td>Item’s circulation type (in code form, such as ‘dvd’)</td>
<td>X</td>
</tr>
<tr>
<td>Call Type</td>
<td>call_type</td>
<td>Call number type for the item (such as LC or Dewey)</td>
<td>X</td>
</tr>
</tbody>
</table>
Preparing Horizon to Work with Borrower Records

Each entity (such as a person, department, or institution) to whom you want to circulate items must be represented by a borrower record in your borrower database. You set up Horizon so that it can retrieve pertinent information from that record during circulation tasks. You create BTYPEs and BTYPE groups and assign borrowers to these groups to manage circulation. Borrower records can be imported or created in a complete format, added quickly (fast-added) with less information at the circulation desk, or copied.

You can choose the fields you want to display on borrower records. You can also choose which fields library staff must complete before they can save a complete new borrower record. If circulation staff needs to quickly add a borrower at the circulation desk, you can specify the fields that must include information before the staff can save that borrower record. You can also specify fields that Horizon can automatically complete from an existing borrower record if library staff copies that borrower record, and set default values for certain borrower record fields.

This section explains these topics:

- Defining a Borrower Circulation Type (BTYPE)
- Displaying and Requiring Data in Fields for Borrower Records
- Choosing Fields for Copied Borrower Records
- Requiring Fields for Fast-Added Borrower Records
- Setting Default Values for Borrower Record Fields
- Choosing Fields for Copied Borrower Records
- Requiring Fields for Fast-Added Borrower Records
- Limiting Borrower Searches for Specific Locations
- Choosing to Keep a History of Checked Out Items (Only available for HIP 4.x sites)
- Importing Borrower Data from an LDAP Directory

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Column Name</th>
<th>Description</th>
<th>Default on fast-added record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item #</td>
<td>item#</td>
<td>Unique identifier, system-assigned</td>
<td></td>
</tr>
<tr>
<td>Call No.</td>
<td>call</td>
<td>Call number</td>
<td></td>
</tr>
<tr>
<td>Copy/Volume</td>
<td>copy</td>
<td>Copy number of the item</td>
<td></td>
</tr>
<tr>
<td>Serial Volume No.</td>
<td>volume</td>
<td>Volume number of the item (if applicable)</td>
<td></td>
</tr>
<tr>
<td>Source</td>
<td>source</td>
<td>Source of the item</td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td>price</td>
<td>Cost in domestic currency</td>
<td></td>
</tr>
<tr>
<td>Staff-Only</td>
<td>staff_only</td>
<td>Check box to mark item for staff-only use</td>
<td></td>
</tr>
<tr>
<td>Item Note</td>
<td>notes</td>
<td>Any comments about the item</td>
<td></td>
</tr>
<tr>
<td>Item Status</td>
<td>item_status</td>
<td>Status of the item</td>
<td>X</td>
</tr>
<tr>
<td>Internal Note</td>
<td>internal_note</td>
<td>Non-public note for staff use only</td>
<td></td>
</tr>
</tbody>
</table>
Defining a Borrower Circulation Type (BTYPE)

Borrower circulation types (BTYPEs) determine general circulation rules for different groups of borrowers. (For example, you can have a BTYPE for residents and another BTYPE for non-residents. Each BTYPE would have different circulation rules.) General rules include limits on such things as the number of lost or overdue items and unpaid fines a BTYPE can have, and when a borrower’s barcode should expire.

Because many types of borrowers can share the same circulation rules, you do not need to create a BTYPE for every category of borrower on your system. (For example, you may have both staff and management personnel checking out items in your library. However, if both BTYPEs have exactly the same circulation rules, you only need to create one BTYPE and use it for both types of borrower.)

When you set up a new BTYPE code, Horizon creates a BTYPE group that contains that code. You can also choose to create your own BTYPE groups that contain multiple BTYPE codes. This lets you apply circulation privileges and parameters to more than one BTYPE at a time. (For more information, see “Setting Up Circulation Privileges and Parameters” on page S-51.)

You can create and modify BTYPEs and BTYPE groups whenever you need to. However, you should create most BTYPEs and BTYPE groups before you load or create borrower records so that you can assign appropriate BTYPE codes to the borrower records when you load or create them.

IMPORTANT

Horizon also lets you choose whether default circulation privileges and parameters apply to various BTYPE groups. This means that you should define BTYPEs and BTYPE groups before you set up circulation privileges and parameters.

You can delete a BTYPE if no borrowers are assigned to that BTYPE. If borrowers are assigned to a BTYPE that you want to delete, you must reassign those borrowers to another BTYPE before you can delete the BTYPE. You can also delete BTYPE groups that you create. You should only delete a BTYPE group if you have first deleted all the BTYPEs contained in that BTYPE group.

This section explains these topics:

- Setting Up or Editing a BTYPE
- Setting Up or Editing a Specific BTYPE Expiration Date
- Specifying a Borrower’s Registration to Expire by Birthdate
- Prompting to Change Expiration Date if Borrower Location or btype Changes

Setting Up or Editing a BTYPE

When you set up or edit a new BTYPE, you set standards for how your library policies affect borrowers of that type.

For example, you can specify when Horizon reminds library staff to check a borrower’s address or renew the borrower’s library registration. You can also set maximum values for options such as the amount of unpaid fines or the number of overdues that your library policy allows before a BTYPE can no longer check out items.
Any maximum you set in the BTYPE record causes a block message to display in Circulation when that maximum is reached for a borrower of that BTYPE. If a borrower exceeds the maximum and tries to check out an item, Horizon does not allow the checkout to proceed until the issue is resolved. (For more information, see “Setting Up Blocks” on page S-86.)

Authorized staff members can override blocks. (For more information, see “Roles and Passkeys” in the “Security and Preferences” chapter of the System Administration Guide.)

To set up or edit a borrower circulation type (BTYPE)

View: btype

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrower Type</td>
<td>Enter a code that identifies the borrower circulation type (BTYPE). Horizon uses this same code for the corresponding BTYPE group it creates from the BTYPE setup. Whenever you want to link a BTYPE to a set of circulation rules, you use the BTYPE group code.</td>
</tr>
<tr>
<td>No. of Borrowers</td>
<td>This is a read-only field that displays the number of borrower records that link to this BTYPE. Horizon updates this field automatically.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the BTYPE. This description should be unique and may help identify the circulation rules that you want to apply to this BTYPE. (For example, enter “faculty” or “staff”.).</td>
</tr>
</tbody>
</table>
### Defining a Borrower Circulation Type (BTYPE)

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Address Check (days)</strong></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>- Enter the number of days that Horizon should wait before displaying an address check prompt to remind staff to verify a borrower’s information.</td>
</tr>
<tr>
<td></td>
<td>This time period starts whenever a new borrower record is created, or each time a borrower’s information is verified.</td>
</tr>
<tr>
<td></td>
<td>Choose a period of time that ensures current addresses for borrowers but is not so frequent that these checks become a problem at the circulation desk. (For example, in an academic library, you may want to check student addresses every term or semester, while you might check faculty addresses only once every year.)</td>
</tr>
<tr>
<td></td>
<td>- If you do not want the address check prompt to ever display for this BTYPE, enter a large number, such as “9999” in this field.</td>
</tr>
<tr>
<td></td>
<td>- If you want Horizon to prompt for an address check each time a borrower of this type is identified, enter “0” (zero).</td>
</tr>
<tr>
<td><strong>Expiration (days)</strong></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>- Enter the number of days that Horizon should wait before displaying a borrower registration renewal prompt during checkout.</td>
</tr>
<tr>
<td></td>
<td>This time period starts whenever a new borrower record is created, or each time a borrower’s information is verified.</td>
</tr>
<tr>
<td></td>
<td>- If you do not want the borrower registration renewal prompt to ever display for this BTYPE, enter “999” in this field.</td>
</tr>
<tr>
<td></td>
<td>- If you want Horizon to prompt for a registration renewal each time a borrower of this BTYPE is identified, enter “0” (zero).</td>
</tr>
<tr>
<td><strong>Use Age for Expire Date</strong></td>
<td>If you want to specify that a borrower’s registration expires on their birthday, mark this box. (For more information, see “Specifying a Borrower’s Registration to Expire by Birthdate” on page S-32.)</td>
</tr>
<tr>
<td><strong>Expire Age</strong></td>
<td>Enter the age at which you want a borrower’s registration with this BTYPE to expire.</td>
</tr>
</tbody>
</table>
Preparing Horizon to Work with Borrower Records

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max. Unpaid Fines</td>
<td>Enter the amount of fines that a borrower can owe before Horizon displays a block message during circulation.</td>
</tr>
<tr>
<td>Max. Overdues</td>
<td>Enter the maximum number of items a borrower can have overdue before Horizon displays a block message during circulation.</td>
</tr>
<tr>
<td>Request Period (days)</td>
<td>Enter the number of days items requested by a borrower with this BTYPE remain in the request queue before Horizon Day End deletes the request.</td>
</tr>
<tr>
<td>Card Fee</td>
<td>If you charge a fee for library cards, enter the amount of the fee. Horizon adds a card fee block in these cases:</td>
</tr>
<tr>
<td></td>
<td>• If a BTYPE changes and the borrower’s library card expires.</td>
</tr>
<tr>
<td></td>
<td>• If the expiration date changes, the BTYPE’s Use Age for Expire Date check box is marked, and the borrower would be due for a card fee within the BTYPE’s new expiration period.</td>
</tr>
<tr>
<td></td>
<td>However, if only the BTYPE changes, Horizon does not add a card fee block for the borrower.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>You must call Horizon customer support to activate the Card Fee feature.</td>
</tr>
<tr>
<td>Sales Tax Exempt</td>
<td>If you want to exempt borrowers of this type from sales tax, mark this box.</td>
</tr>
<tr>
<td>Fee Notice Type</td>
<td>Mark the type of fee notice you want to send to borrowers of this type:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Normal fee notice</strong>. When a borrower owes a fee or fine, Horizon generates a normal notice as part of the Day End activity and Notice Generation actions.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Numbered invoice</strong>. Horizon generates a custom invoice notice. (For more information about custom notices and invoices, see “Customizing Notices” on page S-148.)</td>
</tr>
<tr>
<td>Max. Bookings</td>
<td>If you use Advanced Booking, enter the maximum number of bookings a borrower can have pending before Horizon displays a block message during circulation.</td>
</tr>
</tbody>
</table>
## Defining a Borrower Circulation Type (BTYPE)

In this field | Do this
---|---
Max. Bookings/Title | If you use Advanced Booking, enter the maximum number of bookings a borrower can make on a single title before Horizon displays a block message during circulation.

Max. Bookings/Title/Day | If you use Advanced Booking, enter the maximum number of bookings a borrower can make on a single title per day before Horizon displays a block message during circulation.

Max. Contiguous Bookings | If you use Advanced Booking, enter the maximum number of back-to-back bookings a borrower can make on a single title before Horizon displays a block message during circulation.

Max. Days Overdue | Enter the maximum number of days a borrower can have any item overdue before Horizon displays a block message during circulation.

Max. Days Acct. Overdue | Enter the maximum number of days a borrower can have unpaid fines before Horizon displays a block message during circulation.

(For example, if the maximum number of days an account can be overdue is twenty days and a borrower still owes fines on the twenty-first day after fines were initially charged, Horizon would block checkout for that borrower.)

Max. Days Recall Overdue | Enter the maximum number of days a borrower can have a recalled item overdue before Horizon displays a block message during circulation.

When the library recalls an item, the due date changes. The item becomes overdue based on the new due date. (For more information on recalling items, see “Setting Recall Rules” on page S-133.)
Preparing Horizon to Work with Borrower Records

Setting Up or Editing a Specific BTYPE Expiration Date

If you want to, you can choose to specify an exact date when a BTYPE’s registrations expire. (For example, you might want student borrowers’ registrations to expire on the last day of school.) When you choose a specific date for a BTYPE registration to expire, the specific date overrides the number of days entered in the expiration (days) field of the btype view for the same BTYPE.

For example, suppose you have a specific BTYPE with a default expiration date of 120 days. You then set an expiration date of March 15 for that BTYPE. On February 10 you create a new borrower record of that BTYPE. The borrower record will expire on March 15 because the specific expiration date overrides the number of days to expiration.

You can also postpone the use of a specific expiration date for newly created BTYPE records until after a date you specify.

To set up or edit a BTYPE expiration date

1. Open the btype_expiration_date view in the Table Editor.
   Horizon opens the List Borrower Type Expiration Dates window.
2. Choose the expiration date definition that you want to change, or create a new expiration date definition.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checkout Message</td>
<td>If you want to, enter a message to display during circulation when borrowers with this BTYPE try to check out items.</td>
</tr>
<tr>
<td>Home Service Delivery</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you use Home Service and the BTYPE is a Home Service type, enter or choose the code for the Home Service delivery method.</td>
</tr>
<tr>
<td></td>
<td>• If the BTYPE does not use Home Service, leave this field blank.</td>
</tr>
<tr>
<td></td>
<td>(For more information on Home Service, see the Home Service Guide.)</td>
</tr>
<tr>
<td>Max. Claim Returned</td>
<td>Enter the maximum number of items a borrower can claim to have returned before Horizon displays a block message during circulation.</td>
</tr>
<tr>
<td>Max. Lost</td>
<td>Enter the maximum number of items a borrower can have lost before Horizon displays a block message during circulation.</td>
</tr>
</tbody>
</table>
Horizon displays the Edit Borrower Type Expiration Dates window:

3 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrower Type</td>
<td>Enter or choose the code for the BTYPE to which you want the expiration date to apply.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter or choose the code for the location where the borrower’s registration expires.</td>
</tr>
<tr>
<td>After Date</td>
<td>If you want to, enter the date after which the BTYPE expiration date becomes effective. All borrower records of this BTYPE that are created after the date you enter in this field will have the fixed expiration date from this table instead of expiring after the number of days you set in the btype view. If you leave this field blank, all borrower records of this BTYPE that are created after you finish this task will have the fixed expiration date from this view.</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Enter the fixed expiration date that you want to apply to borrower records with this BTYPE. After this expiration date passes, BTYPE records again expire after the number of days you specified in the BTYPE record.</td>
</tr>
</tbody>
</table>

4 Save your changes.
Preparing Horizon to Work with Borrower Records

Specifying a Borrower’s Registration to Expire by Birthdate

If you want to, you can specify that borrowers’ registrations expire on their birthdates. (For example, you might want the “Juvenile” BTYPE to expire when a student turns fifteen. In this case, when a borrower tries to check out an item after his fifteenth birthday, Horizon prompts you to renew the borrower’s registration. You can then choose to renew the borrower’s registration and assign an “Adult” BTYPE to the borrower.)

**IMPORTANT**

You must enter birthdates in your borrower records in order for Horizon to expire a borrower’s registration on the birthdate.

In addition, by default, the Birthdate field does not display on a fast-added borrower record. If you fast-add a borrower, and want to expire the registration based on birthdate, you will need to display the Edit Borrower window for the borrower and add the birth date of the borrower in the Birthdate field.

To make it easier to expire borrower registrations based on birthdates, even for fast-added borrowers, SirsiDynix recommends that you add the Birthdate field to the Edit New Borrower window as a required field before the BType field. (For more information on adding fields to edit windows, see “Adding a Column to a Search List View or Edit Window” in the “Reconfiguring List and Edit Windows” section of the “Introduction to Horizon Views” chapter of the *System Administration Guide*.)

When you choose to expire borrowers’ registrations by birthdate, this date overrides the number of days entered in the expiration (days) field in the btype view. This date also overrides the specific date that you set up in the btype_expiration_date view. (For more information on the btype_expiration_date view, see “Setting Up or Editing a Specific BTYPE Expiration Date” on page S-30.)

**To specify a borrower’s registration to expire by birthdate**

1. Open the btype view in the Table Editor. Horizon opens the List Borrower Circulation Types window.
2. Choose the BTYPE for which you want to specify an expiration age.
Horizon displays the Edit Borrower Circulation Types window:

3. Mark the **Use Age for Expire Date** box.

4. In the **Expire Age** field, enter the age at which you want a borrower’s registration with this BTYPE to expire.

5. Save your changes.

**Prompting to Change Expiration Date if Borrower Location or btype Changes**

You can configure Horizon to prompt staff members to choose whether the expiration date should be changed if the borrower location or btype changes.

NOTE

If your library charges patrons for library cards, you may want to configure this setting because the charge may be reapplied when the expiration date is updated.

**To enable the feature**

1. Run this SQL command on your database:

   ```sql
   IF NOT EXISTS (SELECT * FROM feature_activation WHERE feature_activation='ExpWarn')
   BEGIN
      INSERT feature_activation (feature_activation, descr, enabled)
      VALUES ('ExpWarn', 'Prompt if changing borrower expiration date', 1)
   END
   ELSE
   BEGIN
      UPDATE feature_activation SET enabled=1 WHERE feature_activation='ExpWarn'
   END
   ```
Preparing Horizon to Work with Borrower Records

Displaying and Requiring Data in Fields for Borrower Records

You can choose what columns from the borrower and item tables you want to display as fields on borrower records. You can require that staff enter information in some fields before they can save a new registration. (For a list of default columns and columns you can add, see “Default Fields on Borrower Records” on page S-39.)

To display or require data in fields for borrower records

1. Open the mq_view view in the Table Editor, or start the View Control process. The default location of this process is the Administration\System Setup folder on the navigation bar. Horizon opens the List Search window.
2. Enter “borrower” in the Search for field. Horizon opens a List Horizon View window.
3. Double-click borrower. Horizon opens an Edit Horizon View window.
4. Display the Edit View group:

   ![Edit Horizon View window]

5. If you want to, add any columns that you want to display as fields on a borrower record. (For more information, see “Adding a Column to a Search List View or Edit Window” in the “Introduction to Horizon Views” chapter of the System Administration Guide.)
6. Mark the Required box for each column in the Edit View group that library staff must complete as part of a borrower record.
7. Save your changes.
Setting Default Values for Borrower Record Fields

Horizon lets you set default values for some fields in new borrower records. When library staff creates a new borrower record, Horizon completes the fields with your default values. These fields are editable.

You can set defaults for multiple locations by using alternate views. You do this by creating a template with default values that are common to all locations. Then copy the template and create alternate views with values that are specific to each location.

You may want to assign default values to fields like these:

- Location
- Phone Type
- City, ST
- Postal Code
- Mail Sort Type

To set default values for borrower record fields

1. Open the mq_view view in the Table Editor, or start the View Control process.
   The default location of this process is the Administration\System Setup folder on the navigation bar.
   Horizon opens the List Search window.
2. Enter “borrower_fast” in the Search for field.
   The borrower_fast view controls default information for both fast-added and regular borrower records.
   Horizon opens an Edit Horizon View window.
3. Display the Edit View group:

   ![Edit Horizon View](image)

   Use this field to enter the default value you want to use in all borrower records.
Preparing Horizon to Work with Borrower Records

4 Use the drop-down menu to choose the field for which you want to specify a default value.
   (For example, choose the location column.)

5 In the Default Value field, specify the default values you want to use for the column you chose.
   (For example, enter your library’s name.)

6 Save your changes.

Choosing Fields for Copied Borrower Records

You can set up Horizon so that, when a library staff member copies a borrower record, Horizon automatically completes some of the fields in the new record. You can also choose which fields staff must complete before Horizon saves the record, and which fields staff can edit. (For more information about copying borrower records, see “Copying a Borrower Record” in the “Borrower and Item Records” chapter of the Circulation Guide.)

**WARNING**

Changing editing property options (other than emptying a field on copy) affects the way all borrower records function and display. This means that any fields you designate as “required” are required for any borrower record created by any method (including from scratch or imported). Consider how you want your system to function before making any changes.

To choose fields for copied borrower records

1 Open the mq_view view in the Table Editor, or start the View Control process.

   The default location of this process is the Administration\System Setup folder on the navigation bar.

   Horizon displays the List Horizon View window with a search window on top.

2 Search for and open the view containing the field whose information you want copied into the new record.

   (For example, you may want to copy information from one of these views: borrower_phone, borrower_barcode_fast, borrower_address, hb_borrower, or borrower_pac_access_type.)

   **NOTE**

   You should not set up Horizon to copy any addresses other than the permanent address.

3 Display the Edit View group.

4 Edit or update one or more of these options in the Edit Prop. field:

<table>
<thead>
<tr>
<th>Mark this option</th>
<th>If you want to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Editable</td>
<td>Let the library staff change the information in the field.</td>
</tr>
</tbody>
</table>
Requiring Fields for Fast-Added Borrower Records

Your library may want to let circulation staff register new or out-of-area borrowers with a shortened borrower record. This lets you circulate items to borrowers who are new to your library more quickly than if you required a complete registration. Library staff can complete the information in these “fast-added” records at a later time.

You can edit the required information for a borrower’s fast-added registration. (For a list of default columns and columns you can add, see “Default Fields on Borrower Records” on page S-39.)

To require fields for fast-added borrower records

1. Open the mq_view view in the Table Editor, or start the View Control process.
   The default location of this process is the Administration\System Setup folder on the navigation bar.
   Horizon opens the List Search window.
2. Enter “borrower_fast” in the Search for field.
   Horizon opens a List Horizon View window.
3. Double-click borrower_fast.
   Horizon opens an Edit Horizon View window.

<table>
<thead>
<tr>
<th>Mark this option</th>
<th>If you want to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required</td>
<td>Require the library staff to complete the field before Horizon saves the record.</td>
</tr>
<tr>
<td>Empty on Copy</td>
<td>Leave the field empty in the copy of the record. Mark this option for fields that should be unique for each record, such as the borrower name. Clearing this option imports the information in the field into the new record.</td>
</tr>
<tr>
<td>Batch Change</td>
<td>Leave this box unmarked.</td>
</tr>
</tbody>
</table>

5. Save your changes.
4 Display the Edit View group:

Mark this box to require that staff members enter information stored in the column for a fast-added item.

5 If you want to, add any columns that you want to require as fields on a fast-added borrower record.

(For more information, see “Adding a Column to a Search List View or Edit Window” in the “Introduction to Horizon Views” chapter of the System Administration Guide.)

6 Mark the Required box for each column in the Edit View group that library staff must complete as part of a fast-added borrower record.

(For a list of default columns and columns that you can require, see “Default Fields on Borrower Records” on page S-39.)

7 Save your changes.
# Default Fields on Borrower Records

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Column Name</th>
<th>Description</th>
<th>Default on fast-added record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrower No.</td>
<td>borrower#</td>
<td>Unique identifier, system-assigned</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>location</td>
<td>Location code</td>
<td>X</td>
</tr>
<tr>
<td>BTYPE</td>
<td>btype</td>
<td>Borrower type code</td>
<td>X</td>
</tr>
<tr>
<td>Exp. Date</td>
<td>expiration_date</td>
<td>Date the borrower’s library privileges expire</td>
<td>X</td>
</tr>
<tr>
<td>Pin#</td>
<td>pin#</td>
<td>User-supplied unique identifier (for Telephone Messaging)</td>
<td>X</td>
</tr>
<tr>
<td>Language</td>
<td>language</td>
<td>Language (for Telephone Messaging)</td>
<td>X</td>
</tr>
<tr>
<td>Name</td>
<td>name</td>
<td>Person’s name</td>
<td>X</td>
</tr>
<tr>
<td>ID</td>
<td>second_id</td>
<td>User-supplied unique identifier (for example, social security number)</td>
<td>X</td>
</tr>
<tr>
<td>Birth Date</td>
<td>birth_date</td>
<td>Date of birth</td>
<td></td>
</tr>
<tr>
<td>Note</td>
<td>borrower_note</td>
<td>Message to/about borrower</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>phone_no</td>
<td>Phone number</td>
<td>X</td>
</tr>
<tr>
<td>Type</td>
<td>phone_type</td>
<td>Phone number usage code, such as work or home</td>
<td>X</td>
</tr>
<tr>
<td>Addr. Type</td>
<td>address_type</td>
<td>Type of address: permanent or temporary</td>
<td>X</td>
</tr>
<tr>
<td>Begin</td>
<td>valid_from_date</td>
<td>Start date at address (for temporary address)</td>
<td>X</td>
</tr>
<tr>
<td>End</td>
<td>valid_to_date</td>
<td>End date at address (for temporary address)</td>
<td>X</td>
</tr>
<tr>
<td>Line 1</td>
<td>address1</td>
<td>First line in address</td>
<td>X</td>
</tr>
<tr>
<td>Line 2</td>
<td>address2</td>
<td>Second line in address</td>
<td>X</td>
</tr>
<tr>
<td>Line 3</td>
<td>address3</td>
<td>Third line in address</td>
<td>X</td>
</tr>
<tr>
<td>Barcode</td>
<td>bbarcode</td>
<td>Unique library-assigned barcode</td>
<td>X</td>
</tr>
<tr>
<td>Date Lost</td>
<td>lost_date</td>
<td>Date borrower lost barcode (if applicable)</td>
<td></td>
</tr>
<tr>
<td>Barcode</td>
<td>bbarcode</td>
<td>Barcode assigned for proxy of a certain borrower</td>
<td></td>
</tr>
</tbody>
</table>
## Preparing Horizon to Work with Borrower Records

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Column Name</th>
<th>Description</th>
<th>Default on fast-added record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Lost</td>
<td>lost_date</td>
<td>Date borrower lost proxy barcode (if applicable)</td>
<td></td>
</tr>
<tr>
<td>Proxy Borrower</td>
<td>proxy_borrower#</td>
<td>Borrower number of person being proxied</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>name</td>
<td>Name of the borrower being proxied</td>
<td></td>
</tr>
<tr>
<td>Date Expire</td>
<td>proxy_expiration_date</td>
<td>Date proxy borrower barcode expires</td>
<td></td>
</tr>
<tr>
<td>Stat Class</td>
<td>bstat</td>
<td>Person’s borrower statistical class (BSTAT) category</td>
<td></td>
</tr>
<tr>
<td>Security Group</td>
<td>security_group</td>
<td>Person’s security group (determines system privileges)</td>
<td></td>
</tr>
<tr>
<td>PAC Access Type</td>
<td>pac_access_type</td>
<td>Person’s type of access to PAC (determines privileges on a flavor by flavor basis)</td>
<td></td>
</tr>
<tr>
<td>Route</td>
<td>route</td>
<td>Unique Home Service identifier, user assigned</td>
<td></td>
</tr>
<tr>
<td>Stop Number</td>
<td>stop_number</td>
<td>Stop number on this Home Service route</td>
<td>X</td>
</tr>
<tr>
<td>Last Visit Date</td>
<td>last_visit</td>
<td>Date of next anticipated visit</td>
<td>X</td>
</tr>
<tr>
<td>Next Visit Date</td>
<td>next_visit</td>
<td>Date of most recent Home Service visit by library staff</td>
<td>X</td>
</tr>
<tr>
<td>Visit Freq.</td>
<td>visit_frequency</td>
<td>A 1-digit to 10-digit number indicating the frequency of Home Service visits to this borrower</td>
<td></td>
</tr>
<tr>
<td>Visit Comments</td>
<td>visit_comments</td>
<td>Comments from most recent or for next Home Service visit</td>
<td></td>
</tr>
<tr>
<td>Equipment</td>
<td>equipment</td>
<td>Type of equipment used by the Home Service borrower</td>
<td></td>
</tr>
<tr>
<td>Reader’s profile</td>
<td>profile</td>
<td>Notes about the preferences of this Home Service reader</td>
<td></td>
</tr>
<tr>
<td>Certified by</td>
<td>certified_by</td>
<td>Certified as Home Service user by this source</td>
<td></td>
</tr>
</tbody>
</table>
Limiting Borrower Searches for Specific Locations

You can set up your system to automatically limit borrower searches to specific groups of locations.

**IMPORTANT**

In order to complete this task, you need to be familiar with SQL and have a SQL query tool available (such as SQL Advantage for Sybase or Query Analyzer for MS SQL Server).

The steps in this section explain how to create a borrower alpha (browse) index and limit the borrowers in that index to a specific set of locations.

This section explains these topics:
- Setting Up a New Location-limited Borrower Browse Index
- Setting Up a New Location-limited Borrower Keyword Index
- Setting Up a New Alternate Borrower Search

**Setting Up a New Location-limited Borrower Browse Index**

First, you need to set up a new location-limited browse index for the borrower.

**To set up a new location-limited borrower browse index**

1. Download the `BorrowerBrowseSearchIndexTemplate.sql` SQL text file from the location where you accessed these Update Pages.
2. Open the text file for editing.
3. Search for `$` in the file and replace it with a 7-character entry code for the new index that you are creating. For example, replace `$` with `borrM` for a main borrower only search.
4. Execute the SQL script using your SQL Query tool.
5. Open the Horizon client and log in.
6. Go to Administration > Table Editor.
7. Select the `mq_index` table, and then click OK.
8. Select the new `mq_index` that you specified in step 3, and then click Edit. For example, `borrM`.
9. In the Location Limit area, add any locations that should appear in the new index.
10. To rebuild the borrower name indexes, open a command prompt and run the following command:
    ```
    reindex.exe /S /P /U /D /M3 /Aborrower
    ```

**NOTE**

The entry code that you specify cannot have more than seven alphanumeric characters, but it can have as few as you want.
Preparing Horizon to Work with Borrower Records

Setting Up a New Location-limited Borrower Keyword Index

Next, you need to set up a new location-limited keyword index for the borrower.

To set up a new location-limited borrower keyword index

1. Download the `BorrowerKeywordSearchIndexTemplate.sql` SQL text file from the location where you accessed these Update Pages.
2. Open the text file for editing.
3. Search for $ in the file and replace it with a 7-letter entry code for the new index that you are creating. For example, replace $ with `borrKwM` for a main borrower keyword search.
4. Execute the SQL script using your SQL Query tool.
5. Open the Horizon client and log in.
6. Go to Administration > Table Editor.
7. Select the `mq_index` table, and then click OK.
8. Select the new `mq_index` that you specified in step 3, and then click Edit. For example, `borrKwM`.
9. In the Location Limit area, add any locations that should appear in the new index.
10. To rebuild the borrower name indexes, open a command prompt and run the following command:
    ```
    reindex.exe /S /P /U /D /M3 /Aborrower
    ```

Setting Up a New Alternate Borrower Search

Lastly, you must set up a new alternate borrower search.

To set up a new alternate borrower search

1. Open the Horizon client and log in.
2. Go to Administration > Table Editor.
3. Select the `search` table, and then click OK.
4. Select the `Borr` search.
5. Copy the setup of the `Borr` search by selecting it and going to File > Copy Record. This creates a new search.
6. In the Search field, type a name for the new search. For example, use `BorrM` for a new search that uses the `borrM` and `borrKwM` `mq_index`es and is a main borrower only search.
7. Replace the `Mq Index` entries in the new search with the new alternate search indexes you have just created. For example, replace the default `Borr` `mq_index` entries with the `BorrM` `mq_index` entries.
8. For the Browse search, in the Display View field, change the code to the index you created in “Setting Up a New Location-limited Borrower Browse Index” on page S-41. For
Choosing to Keep a History of Checked Out Items

You can specify if you want Horizon to keep a history of checked out items for all borrowers at a specific location. If you choose to do this, borrowers can view a history of checked out items in Horizon Information Portal 4.0 and above. In addition, staff can view the history of items for a borrower from the Circ History group on the borrower record.

Horizon Information Portal 4.0 (and above) will directly access the newly populated circ_longterm_history table, which is updated whenever an item is checked out, to access data and present the appropriate formatted data to borrowers.

To keep a history of checked out items

1. Open the location view.
   Horizon displays the Edit Location Parameters window:

   ![Edit Location Parameters](image)

2. In the Keep Circ History field, mark one of these options:
   - Do Not Keep. Mark this if you do not want to keep a circulation history for borrowers at your location.
     If you mark this option, Horizon does not keep any history of checked out items for borrowers at your location, regardless of what the borrower specifies through Information Portal.
Preparing Horizon to Work with Borrower Records

- **Always Keep.** Mark this if you want to keep a circulation history for borrowers at your location.
  
  If you mark this option, Horizon always keeps a history of checked out items for borrowers at your location, regardless of what the borrower specifies through Information Portal.

- **Allow Borrower to Choose.** Mark this to give borrowers the option to keep a history of checked out items.

  3 **In the History Duration (Days) field, enter the number of days you want to retain the history of checkouts for borrowers at your location before Day End purges the history.**

  If you want to retain the history for an indefinite period of time, enter a high number, such as “9999”.

  If you do not want to retain the history for any period of time, enter a “0”. (Entering a “0” overrides the Always Keep and Allow Borrower to Choose options.)

  4 **In the Max History Transactions field, enter the maximum number of checked out items you want to retain for any one borrower at your location.**

  If database storage space is an issue for you, you may want to set this number fairly low so that borrowers who circulate a high volume of items don’t use up a lot of space.

  **IMPORTANT**

  The History Duration (Days) and Max History Transactions fields work together to determine how Horizon retains the History of Checked Out Items. Horizon will use the number of days in the History Duration (Days) field, or the number of transactions in the Max History Transactions field, whichever number is reached first. (For example, if the number of duration days elapse, Horizon deletes the oldest transactions when Day End runs.)

  5 **Save your changes.**

**Viewing a Borrower’s History of Checked Out Items**

If you choose to keep a history of a borrower’s checked out items, staff can view this history on the borrower’s record. Staff can only view the history; they cannot edit existing items or add new items to the history. (To prevent staff from editing or adding information, Horizon disables the Add and Delete buttons in the Circ History group.)

If you do not want your staff to view this history, you can remove the group from the Borrower view.

**To view a borrower’s history of checked out items**

  1 **In the Checkout window, identify the borrower whose history of checked out items you want to view.**

  2 **Choose Borrower, Edit Borrower.”**
3 Display the **Circ History** group:

![Circ History Group](image)

4 Display the history of all checked out items for the borrower from the drop-down list in the **Circ History** group.

### Importing Borrower Data from an LDAP Directory

Horizon 7.4 and later versions let you import borrower-specific information stored in a directory on an LDAP server to borrower tables in your Horizon database. This feature is useful for your library if you authenticate borrowers using an LDAP server and you want to use borrower data stored in the directory.

Before you can import data, you must set up a profile for each directory from which you want to import data. This profile specifies the connection to the LDAP server, as well as the context to which you want to bind.

For each profile, you map borrower columns from tables in the Horizon database to attributes in the LDAP directory schema. Once attributes from the LDAP directory are accurately mapped to borrower columns, any changes to borrower data on the LDAP server can automatically be updated in the Horizon database borrower table each time the Borrower LDAP (DeBLDAP) Day End process runs.

This section explains these topics:

- Setting Up an LDAP Directory Profile
- Mapping LDAP Schema Attributes to Horizon Borrower Table Columns
- Defining Match Point Indexes
- Setting Up the DEBLDAP Day End Process

### Setting Up an LDAP Directory Profile

You set up a profile for each LDAP directory. This profile specifies connection information, such as the port, IP, and the DNS of the server. The profile also specifies the context to which you want to bind.
Importing Borrower Data from an LDAP Directory

You can create a LDAP directory profile for each LDAP server you want to connect to and import data from.

**IMPORTANT**

Horizon comes with a default profile that is managed by the Borr-LDAP function. This profile contains no default mapping. Do not modify this profile.

To set up an LDAP directory profile

1. Start the LDAP Profile Administration process.
   This process is hidden by default on the Navigation Bar. You must choose to display this process, which is in the Circulation/Borrower-LDAP Menu.
2. Click New to create a new directory profile.
3. Click Edit.
   Horizon displays the Edit LDAP Profile Setup window:

   ![Edit LDAP Profile Setup Window]

4. Complete these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDAP Profile</td>
<td>Enter a code to make the profile you are setting up unique.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the profile.</td>
</tr>
</tbody>
</table>
   | LDAP url      | Enter the URL to the LDAP server.  
   |               | Follow this pattern as you enter the URL:  
   |               | ldap://X500.bund.de (the DNS or IP address):port number/ |
   | Base DN       | Enter the base domain name or context to which you want to bind when you connect to the LDAP server. |
Mapping LDAP Schema Attributes to Horizon Borrower Table Columns

After you create a profile for an LDAP server, you can map the borrower table columns to the LDAP attributes. Horizon lets you map all borrower related columns from these seven borrower tables:

- borrower
- borrower_address
- borrower_barcode
- borrower_phone
- borrower_bstat
- borrower_911
- borrower_pac_access_type

The first time you set up LDAP in Horizon, you can set up a mapping using standard classes and then save that mapping. This is because you may need to set up a profile to connect to another LDAP server. This allows you to use the default mapping that you already set up.

In addition, you may have multiple LDAP servers that you need to map to. This means that you can set existing mapping and then reuse it. When you use a mapping and if a column did not exist, you must map only what is available on the server attributes. You must also set the default.

To map the LDAP schema attributes to Horizon borrower table columns

1. Start the Borr-LDAP Schema Mapping process.
   You have several options as you map columns and attributes.
   See these sections for more information:
   - Mapping Database Columns to LDAP Attributes
   - Assigning a Database Column to a Constant Value

5. Save your changes.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class</td>
<td>Enter the inetOrgPerson object class or the lowest object class in your hierarchy. You must use this object class because it inherits all the attributes from the other higher subclasses.</td>
</tr>
<tr>
<td>User</td>
<td>Enter the user name to access the LDAP directory.</td>
</tr>
<tr>
<td>Password</td>
<td>Enter the password to access the LDAP directory.</td>
</tr>
</tbody>
</table>

NOTE
If you have customized any columns within these seven tables, Horizon lets you also map these columns, as desired.
Importing Borrower Data from an LDAP Directory

Mapping Database Columns to LDAP Attributes

Follow these steps as you map columns in borrower tables to LDAP attributes:

1. Choose an LDAP server profile from the LDAP Server drop-down list.

2. Highlight the column from the Horizon database you want to map to the LDAP attribute.

3. Highlight the attribute from the LDAP schema you want to map to the database column.

4. Click Map to map the highlighted database column to the highlighted LDAP attribute.

5. Successfully mapped columns and attributes display here.

6. Repeat steps 1-5 if you need to map more than one database column to an LDAP attribute. For example, the borrower_address table in the Horizon database has four address columns that you need to map to the one postalAddress LDAP attribute. When you map more than one database column to the same LDAP attribute, a number displays next to the attribute indicating the number of that mapping.

**IMPORTANT**

The sequence in which you map columns is important because data is mapped to database columns in the order you map them in the Borrower-LDAP Column Maps window. Data will not display correctly if you map columns in the incorrect order. So, you must map data in the order it is stored in the database. You cannot modify the sequencing of the values after you map.
Assigning a Database Column to a Constant Value

Many Horizon database columns, such as btype and bstat, do not map to standard LDAP attributes. In this case, you need to assign a constant value for these columns. Horizon stores the constant value you assign in the database column. You cannot map this column to a standard LDAP attribute.

For each profile, you can only assign one constant value to each database column. (For example, you can only assign one constant value to the btype column, such as “student.”) As a result, all borrowers imported for a specific profile are assigned a “student” btype. If you want to specify a different constant value for a column, you must create a new profile.

In addition, some Horizon database columns require you to add constant values to data as it is imported. For example, the Horizon database stores borrower name data in the borrower_name column as last name, first name. In the LDAP schema, surname and common name are separate attributes and do not contain a comma. As you map the borrower_name column to the LDAP attributes, you need to add the comma as a constant value.

Follow these steps as you map a database column to a constant value:

1. Highlight the database column you want to specify a constant value for.
2. Enter the constant value for the database column, such as a comma (,).
3. Click Accept to save the constant value of the database column.

You may have several LDAP servers that contain borrower data that you want to import into the Horizon database. If these servers have similar schemas and contexts to which you want to bind, you can create one mapping, set it as the default, and use it as the mapping for other profiles. To set a default, choose File, Apply Default Map in the Borrower-LDAP Column Maps window.
Importing Borrower Data from an LDAP Directory

Defining Match Point Indexes

The Borrower Import from LDAP feature uses the Borrower Import function to add borrowers to your Horizon database. Borrower Import uses indexes in the borrower table as match points to determine if borrower data already exists on the database. These match points eliminate duplicate borrower information.

The Horizon 7.4 upgrade added a new “borrower_dn” index column to the borrower table. When you import new borrowers to the Horizon database from an LDAP directory, a unique domain name is stored in the borrower_dn index column for each borrower you import. This domain name acts as an identifier for each borrower.

In order for Borrower Import from LDAP to determine a match point for existing borrowers that do not have a borrower domain name, you can choose to match on additional indexes in the borrower table. You can choose to match on indexes such as second_id, borrower#, and so forth.

To define match point indexes

1. In the Borrower-LDAP Column Maps window, click the Match button. Horizon displays the Borrower-LDAP Define Match Point Columns window:

2. Follow these steps as you define match points for the mapped columns:

   1. Highlight a mapped index column from the borrower table that you want to use as the first match point.
   2. Click Add to add the mapped index column to the Sequence of Selected Index Columns list.
   3. Click Up or Down to change the sequence these index columns are used as match points.
   4. Click Save to save the sequence of indexes as match points.

   IMPORTANT

   You cannot use mapped columns that contain constant values as match points.
Setting Up the DEBLDAP Day End Process

The new Day End process “Borrower LDAP” (DEBLDAP) is the mechanism that Horizon uses to check for new or updated borrower information from the LDAP directory. The Horizon 7.4 upgrade delivers the DELDAP Day End process as an inactive process. If you want to run it with your Day End suite, you need to add it as an option to the MDayEnd menu. If you want, you can set this process to run daily by adding the “/d” process argument.

Setting Up Circulation Privileges and Parameters

Circulation privileges govern the circulation of items for each location in your library. These privileges determine such things as the length of time for which items can be checked out, the daily rate of fines charged for overdue items, how many times a borrower can renew an item, whether the location uses a grace period for fines, and so forth. Circulation parameters define loan, request, and recall limitations. They can also further define certain kinds of notices, fines, and fees.

For each circulation privilege, you specify a default value that applies to all standard situations at each location group you designate. You also set up any exceptions based on your library’s policies.

When you create a location, an ITYPE, or a BTYPE, Horizon creates location, ITYPE, and BTYPE groups that contain only one code. You can also set up groups that contain as many codes as you want. These groups help you create exceptions to each default circulation privilege because they let you combine BTYPES and ITYPES that can use the same privileges. You can set up exceptions for a single BTYPE group, for a single ITYPE group, or for any combination of borrower and ITYPE groups. Horizon lets you set up as many exceptions as you need.

You may also need to set up some circulation parameters before your Circulation system can implement all of your library’s policies. Circulation parameters affect these aspects of circulation:

- **Locations that lend library items.** (For more information, see “Setting Up or Editing Basic Circulation Policies” on page S-64.)
- **Lost processing fees and fines for overdue items checked out to other borrowers before being checked in.** (For more information, see “Setting Up Fines, Fees, and Suspensions” on page S-71.)
- **Hold requests.** (For more information, see “Setting Up Hold Requests” on page S-102.)
- **Recalls.** (For more information, see “Setting Recall Rules” on page S-133.)
Setting Up Circulation Privileges and Parameters

You may also need to set up some circulation parameters if you use Horizon Telephone Messaging, 3M SelfCheck, or Closed Stack Access.

NOTE

You can choose to control the settings for loan period, renewals, and fine rate from either the location that circulates the item (the circulating location) or the location that owns the item (the owning location). To do this, mark the appropriate button in the Circ Settings by field in the matham view in the Table Editor. (For more information, see “Setting Up Circulation Privileges Tracking” in the “General Setup” chapter of the System Administration Guide.)

For statistics gathering, Horizon credits renewals to the checkout location. If there is no checkout location, Horizon credits renewals to the owning location. (For instructions on generating statistical reports, see “Generating Ad Hoc Statistical Reports” in the “Maintenance and Day End” chapter of the System Administration Guide.)

This section explains these topics:

- Creating or Editing Groups to Define Circulation Privileges and Parameters
- Setting Up or Editing a Circulation Privilege
- Setting Up or Editing a Circulation Parameter

Creating or Editing Groups to Define Circulation Privileges and Parameters

Your library may have large numbers of locations, ITYPEs, and BTYPEs, often with similar setup and regulatory requirements. On the other hand, your library may have only a few locations, ITYPEs, or BTYPEs, each with unique requirements. Horizon uses groups of locations, ITYPEs, and BTYPEs to simplify how you set up circulation rules.

When you initially set up locations, ITYPEs, or BTYPEs, Horizon automatically creates a corresponding group that contains only the code for the location, ITYPE, or BTYPE that you set up. (Horizon uses the same name and description for the group that you defined for the individual location, ITYPE, or BTYPE.) You can also create new groups of locations, ITYPEs, or BTYPEs that have similar requirements by adding multiple codes to a single group. You use these groups to set up circulation privileges and parameters, including hold priorities. When you use multiple-code groups, you can set up fewer privilege defaults. Multiple-code groups also let you set up fewer exceptions to those defaults.

For example, you may have ITYPEs that you do not want to let borrowers request. You can create an ITYPE group that contains any non-requestable ITYPEs. This lets you avoid creating exceptions for each location and each ITYPE.

You can edit your groups at any time. After you move a location, ITYPE, or BTYPE into a group, you should exit Horizon and log back in to assure that the privileges and parameters that apply to that group take effect for the new entry. Similarly, after you remove an entry from a group, you should exit Horizon and log back in to assure that the privileges and parameters no longer affect
that entry. (For example, if you create a new ITYPE that has the same rules as an existing ITYPE group, the new ITYPE adopts the rules of the existing group as soon as you add it to that group and restart Horizon.)

<table>
<thead>
<tr>
<th>NOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you want to apply one set of privileges and parameters to multiple ITYPEs, BTYPEs, or locations, you may need to define new groups, and put into the new groups the set of locations, BTYPEs, or ITYPEs that you want to group together.</td>
</tr>
</tbody>
</table>

For each privilege, you specify a default value that applies to all standard situations at each location group you designate. You also set up any exceptions based on your library’s policies. (For example, you may allow a faculty member to request any item from any location group; however, you may want to restrict a student’s ability to request items to only certain ITYPE groups from only one location.) (For more information and examples related to request privileges [circulation parameter 29], see “Working with Parameter 29 (Request Privileges)” on page S-108.)

**Before You Begin**

Make sure you have set up these things:

- **Locations.** Set up any locations that you want to add to a group. (A location can be a branch, department, or any other segment of your library that you define. (For instructions, see “Library Locations” in the “General Setup” chapter of the System Administration Guide.)

- **ITYPEs.** Set up any ITYPEs that you want to add to a group. (For instructions, see “Preparing Horizon to Work with Item Records” on page S-6.)

- **BTYPES.** Set up any BTYPES that you want to add to a group. (For instructions, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)

Horizon automatically creates a group for each ITYPE, BTYPE, and location that you set up.

**To create or edit a group for defining circulation privileges and parameters**

1. Do one of these options in the Table Editor:

<table>
<thead>
<tr>
<th>To create a group of these</th>
<th>Open this view</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITYPEs</td>
<td>itype_group</td>
</tr>
<tr>
<td>BTYPEs</td>
<td>btype_group</td>
</tr>
<tr>
<td>Locations</td>
<td>location_group</td>
</tr>
</tbody>
</table>

*Circulation Setup Guide*  S-53
2 Choose the group you want to edit, or create a new group.

![horizon](image)

**IMPORTANT**

SirsiDynix recommends that you do not edit a group that contains only one code. Instead, create a new group and add all of the codes that you want to group. This lets you always have one group for every code on your system so that you can always add any exception to any privilege or parameter.

Horizon opens an Edit Groups for Circ Priv/Param window. Here is an example of an Edit IType Groups window:

3 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>IType Group, BType Group, or Location Group</td>
<td>Enter a unique code for the group.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the group.</td>
</tr>
<tr>
<td></td>
<td>This description displays in the circ_privilege_code and circ_parameter views.</td>
</tr>
<tr>
<td>IType, BType, or Location</td>
<td>Enter or choose the code for the ITYPE, BTYPE, or location that you want to add to the group you are creating.</td>
</tr>
<tr>
<td></td>
<td>Click <strong>New</strong> to add additional codes to the group.</td>
</tr>
</tbody>
</table>

4 Save your changes.
Setting Up or Editing a Circulation Privilege

Circulation privileges govern the circulation of items for each location in your library. Here is a list of the circulation privileges that you can set up in Horizon:

<table>
<thead>
<tr>
<th>Privilege</th>
<th>For more information, see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan Period</td>
<td>“Controlling Due Dates” on page S-66.)</td>
</tr>
<tr>
<td>Renewal Period</td>
<td>“Setting Renewal Rules” on page S-100</td>
</tr>
<tr>
<td>Max. Renewals</td>
<td>“Setting Renewal Rules” on page S-100</td>
</tr>
<tr>
<td>Max. Phone Renewals</td>
<td>“Setting Renewal Rules” on page S-100</td>
</tr>
<tr>
<td>Hold Period</td>
<td>“Setting Up Hold Requests” on page S-102</td>
</tr>
<tr>
<td>Grace Period</td>
<td>“Setting Up a Grace Period” on page S-75</td>
</tr>
<tr>
<td>Fine Rate</td>
<td>“Setting Up Fines, Fees, and Suspensions” on page S-71</td>
</tr>
<tr>
<td>First Notice Delay</td>
<td>“Setting Up or Editing Notices and Reminders” on page S-139</td>
</tr>
<tr>
<td>Notice Interval</td>
<td>“Setting Up or Editing Notices and Reminders” on page S-139</td>
</tr>
<tr>
<td>Max. Notices</td>
<td>“Setting Up or Editing Notices and Reminders” on page S-139</td>
</tr>
<tr>
<td>Max. Items Out</td>
<td>“Setting Up Blocks” on page S-86</td>
</tr>
<tr>
<td>Suspend Days</td>
<td>“Setting Up Fines, Fees, and Suspensions” on page S-71</td>
</tr>
<tr>
<td>Guaranteed Loan Period</td>
<td>“Setting Recall Rules” on page S-133</td>
</tr>
<tr>
<td>Recall Loan Period</td>
<td>“Setting Recall Rules” on page S-133</td>
</tr>
<tr>
<td>Recall Fine Rate</td>
<td>“Setting Recall Rules” on page S-133</td>
</tr>
<tr>
<td>First Recall Notice Delay</td>
<td>“Setting Recall Rules” on page S-133</td>
</tr>
<tr>
<td>Recall Notice Interval</td>
<td>“Setting Recall Rules” on page S-133</td>
</tr>
<tr>
<td>Max. Recall Notices</td>
<td>“Setting Recall Rules” on page S-133</td>
</tr>
<tr>
<td>Allow OPAC Renewals</td>
<td>“Setting Renewal Rules” on page S-100</td>
</tr>
<tr>
<td>Max. OPAC Renewals</td>
<td>“Setting Renewal Rules” on page S-100</td>
</tr>
</tbody>
</table>

This task gives general steps for setting up any circulation privilege. You specify the default and exceptions for each privilege based on your library’s policies. You can refer to this section for basic information when you set up a specific circulation privilege.

NOTE

If you edit an existing privilege, make sure you understand any fields that you change. Any changes that you make affect the way Horizon runs Circulation.
Before You Begin

Make sure you have set up these things:

- **Locations and location groups.** Set up a location in Horizon for each location you have. (A location can be a branch, department, or any other segment of your library that you define.) (For instructions, see “Library Locations” in the “General Setup” chapter of the *System Administration Guide*.)

  **IMPORTANT**

  Every circulation privilege must include each location only once in a location group. Horizon delivers an error message if you have the same location assigned multiple times to the same circulation privilege.

- **ITYPEs and ITYPE groups.** (For instructions, see “Preparing Horizon to Work with Item Records” on page S-6.)

- **BTYPEs and BTYPE groups.** (For instructions, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)

You must create locations, ITYPEs, and BTYPEs. Whenever you create a new location, ITYPE, or BTYPE, Horizon creates a group that contains the code that identifies the location, ITYPE, or BTYPE. You can also choose to create your own groups that contain multiple codes. This lets you apply circulation privileges and parameters to more than one location, ITYPE, or BTYPE at a time. (For more information, see “Creating or Editing Groups to Define Circulation Privileges and Parameters” on page S-52 and “Setting Up Circulation Privileges and Parameters” on page S-51.)
To set up or edit a circulation privilege

**View:** circ_privilege_code

**IMPORTANT**

Privileges for all of your location groups display in the circ_privilege_code view. Make sure you choose the privilege for the location group that you want to edit.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Privilege</td>
<td>If you are setting up a new privilege, mark the privilege that you want to set up; otherwise, the privilege that you chose is already marked for you.</td>
</tr>
<tr>
<td>Location Group</td>
<td>Enter or choose the code for the location group to which you want the privilege you are setting up to apply.</td>
</tr>
<tr>
<td>Default</td>
<td>Enter the default that applies to most ITYPEs and BTYPES at the location whose code you entered. Depending on the privilege you are setting up, this default could define a time period, a permitted number of repetitions or items, or a monetary amount. If your default is a time period, mark the Unit (Days, Hours, or Minutes) that describes the unit measure you want; otherwise, mark N/A. If you want to limit the privilege by applying this default to a certain time period, complete the Per field also.</td>
</tr>
</tbody>
</table>
Setting Up Circulation Privileges and Parameters

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per</td>
<td>If you want to apply the default for a certain time period, enter a numeric value for the period of time that you want to use and mark the appropriate Unit value. (For example, enter “12” in the Per field and mark “hours” to apply the privilege default for 12 hours.)</td>
</tr>
</tbody>
</table>

If you have exceptions to the default privileges that affect BTYPEs, ITYPEs, or combinations of the two, complete or update these fields in the Exceptions group. Click New to add multiple exceptions.

<table>
<thead>
<tr>
<th>Borr Type Group</th>
<th>Enter or choose the code for the BTYPE group to which you want to apply the exception. If the exception applies to only an ITYPE group, leave this field empty.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Type Group</td>
<td>Enter or choose the code for the ITYPE group to which you want to apply the exception. If the exception applies to only a BTYPE group, leave this field empty.</td>
</tr>
</tbody>
</table>
### Setting Up or Editing a Circulation Parameter

Circulation parameters define loan, request, and recall limitations. They can also further define certain kinds of notices, fines, and fees. Here is a list of the circulation parameters that you can set up in Horizon:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>For more information, see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request privileges</td>
<td>“Setting Up Hold Requests” on page S-102</td>
</tr>
<tr>
<td>CSA request privileges</td>
<td>“Setting Up or Editing Closed Stack Access Parameters” on page S-138</td>
</tr>
<tr>
<td>Recalls allowed</td>
<td>“Setting Recall Rules” on page S-133</td>
</tr>
<tr>
<td>Loans allowed</td>
<td>“Setting Up a Location to Allow Loans” on page S-65</td>
</tr>
<tr>
<td>Max. CSA requests</td>
<td>“Setting Up or Editing Closed Stack Access Parameters” on page S-138</td>
</tr>
<tr>
<td>Max. requests for itype</td>
<td>“Setting Up Maximum Requests for BTYPES and ITYPES” on page S-112</td>
</tr>
<tr>
<td>Max. CSA requests for itype</td>
<td>“Setting Up or Editing Closed Stack Access Parameters” on page S-138</td>
</tr>
<tr>
<td>Length of hold queue before loan period override applies</td>
<td>“Setting Up Hold Requests” on page S-102</td>
</tr>
<tr>
<td>Max. hold requests</td>
<td>“Setting Up Maximum Requests for BTYPES and ITYPES” on page S-112</td>
</tr>
<tr>
<td>Loan period override for long request queues</td>
<td>“Setting Up Hold Requests” on page S-102</td>
</tr>
<tr>
<td>Charge overdue if item checked out while overdue for another borrower</td>
<td>“Setting Up Overdue Charges for Overlapping Circulations” on page S-78</td>
</tr>
</tbody>
</table>

### In this field | Do this
--- | ---
Value | Enter a numerical value that describes the exception you want to define. If your exception is a time period, mark the Unit (Days, Hours, or Minutes) that describes the unit measure you want; otherwise, mark N/A. If you want to limit the privilege by applying this default to a certain time period, complete the Per field also.
Per | If you want to apply the exception that you are setting up for a certain time period, enter a numeric value for the period of time that you want to assess the exception and mark the appropriate Unit value.
Setting Up Circulation Privileges and Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>For more information, see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charge fine for expired holds</td>
<td>“Charging Fines for Expired Holds” on page S-79</td>
</tr>
<tr>
<td>Telephone Messaging: Number of days to call before overdue notice is sent</td>
<td>“Setting Up Horizon Telephone Messaging Options” on page S-160</td>
</tr>
<tr>
<td>Telephone Messaging: Number of days to call after hold is filled and before notice is sent</td>
<td>“Setting Up Horizon Telephone Messaging Options” on page S-160</td>
</tr>
<tr>
<td>Lost processing fee</td>
<td>“Setting Up a Lost Processing Fee” on page S-78</td>
</tr>
<tr>
<td>Checkout processing fee</td>
<td>“Setting Up Fees for 3M SelfCheck” on page S-79</td>
</tr>
<tr>
<td>Filled hold expiration fee</td>
<td>“Charging Fines for Expired Holds” on page S-79</td>
</tr>
<tr>
<td>Floating collection restrictions</td>
<td>“Setting Up Restrictions for a Floating Collection” on page S-79</td>
</tr>
</tbody>
</table>

This task gives general steps for setting up any circulation parameter. You can refer to this section for basic information when you set up a specific circulation parameter. Specific circulation parameter setup instructions indicate which variables you can use.

For each parameter, you specify the default and exceptions (or “special values”) based on your library’s policies. (For example, you may allow a faculty member to request any item from any location group; however, you may want to restrict a student’s ability to request items to only certain ITYPE groups from only one location.) Depending on the circulation parameter, exceptions may include these variables:

- **OPAC Location Group.** Includes the library whose holdings your PAC displays.
- **Circulation Location Group.** Includes the library where the borrower picks up the item.
- **Borrower Location Group.** Includes the library that houses the borrower’s record.
- **Item Location Group.** Includes the library that owns the item.
- **Borrower Type Group.** Includes the BTYPE affected by the exception.
- **Item Type Group.** Includes the ITYPE affected by the exception.

**NOTE**

If you are using Horizon Information Portal, you need to restart JBoss after you make any changes in circulation parameters. You can do this by clicking the Restart JBOSS button at the bottom of the main Setup or main Customize page.

Before You Begin

Make sure you have set up these things:

- **Locations and location groups.** Set up a location in Horizon for each location you have. (A location can be a branch, department, or any other segment of your library that you define. (For instructions, see “Library Locations” in the “General Setup” chapter of the System Administration Guide.)
- **ITYPEs and ITYPE groups.** (For instructions, see “Preparing Horizon to Work with Item Records” on page S-6.)
- **BTYPEs and BTYPE groups.** (For instructions, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)

You must create locations, ITYPEs, and BTYPES. Whenever you create a new location, ITYPE, or BTYPE, Horizon creates a group that contains the code that identifies the location, ITYPE, or BTYPE. You can also choose to create your own groups that contain multiple codes. This lets you apply circulation privileges and parameters to more than one location, ITYPE, or BTYPE at a time. (For more information, see “Creating or Editing Groups to Define Circulation Privileges and Parameters” on page S-52 and “Setting Up Circulation Privileges and Parameters” on page S-51.)

**To set up a circulation parameter**

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parameter</td>
<td>This is a read-only field that gives the number of the circulation parameter you are editing.</td>
</tr>
<tr>
<td>Description</td>
<td>This is a read-only field that gives the description of the circulation parameter you are editing.</td>
</tr>
<tr>
<td>Using Location, Btype, or Itype</td>
<td>These are read-only fields that list the groups to which the circulation parameter applies. The value of “Y” displayed next to each group tells you that you can use the group to specify exceptions. (If you enter a value in the Special Values group for a field marked with “N” for a parameter, Horizon lets you save the parameter but does not use that group when processing the exception.)</td>
</tr>
</tbody>
</table>
Setting Up Circulation Privileges and Parameters

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>Enter the default that applies to most ITYPEs and BTYPEs at the location whose code you entered. Default values vary, depending on the circulation parameter. (For example, there are two possible values for loan parameters while there are 256—0 to 255—possible values for request parameters.) These values are described in each circulation parameter section, where applicable. Some circulation parameters may have defaults that define a time period, a permitted number of repetitions or items, or a monetary amount. Enter monetary amounts without decimals. (For example, if the amount is five dollars, enter “500”.) If your default is a time period, mark the Unit (Days, Hours, or Minutes) that describes the unit measure you want; otherwise, mark N/A. If you want to limit the parameter by applying this default to a certain time period, complete the Per field also.</td>
</tr>
<tr>
<td>Per</td>
<td>If you want to apply the default for a certain time period, enter a numeric value for the period of time that you want to use and mark the appropriate Unit value. (For example, enter “12” in the Per field and mark “hours” to apply the privilege default for 23 hours.)</td>
</tr>
<tr>
<td>Circ Rule</td>
<td>This is a read-only field. If your library has set up and applied circulation rules, Horizon displays the code for the circulation privilege rule that you have applied to this circulation parameter. (For more information, contact SirsiDynix support.)</td>
</tr>
</tbody>
</table>
### In this field | Do this
--- | ---
You do not need to enter a value in each location group, ITYPE group, or BTYPE group field for each special value. When a field contains no value, the exception (or special value) applies to all possible values for that field, regardless of type.

Click **New** to add multiple special values.

**IMPORTANT**

When Horizon tries to determine which value to use, if you have multiple special values that match, Horizon chooses the one that references BTYPE or ITYPE Groups containing the smallest number of BTYPES or ITYPES. If all special values are equal, Horizon applies an exception with a value of “0” (zero).

| OPAC Location Group | Enter or choose the code for the online PAC location group for which you want to define an exception. |
| Circulation Location Group | Enter or choose the code for the circulation location group where the item is picked up or checked out. |
| Borrower Location Group | Enter or choose the code for the borrower location group where the borrower is registered. |
| Item Location Group | Enter or choose the code for the item location group that owns the item. |
| Borrower Type Group | Enter or choose the BTYPE code for the borrower group to which this exception applies. |
| Item Type Group | Enter or choose the ITYPE code for the item group to which this exception applies. |
Setting Up or Editing Basic Circulation Policies

Before you can use Horizon to circulate any of your library’s holdings, you must set it up to follow your library’s policies.

For example, you need to set up which locations can circulate items. You must also set up the length of time for which you want to let borrowers take items. If a borrower keeps an item longer than that length of time, you can set up Horizon to assess fines or suspend that borrower’s circulation rights. You can set up Horizon to let borrowers make requests and place holds on items that another borrower already has checked out. You can also set up how and when Horizon sends borrowers notices.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Value                  | Enter a numerical value that describes the exception you want to define.  
If your exception is a time period, mark the Unit (Days, Hours, or Minutes) that describes the unit measure you want; otherwise, mark N/A.  
If you want to limit the circulation parameter by applying this default to a certain time period, complete the Per field also. |
| Per                    | If you want to apply the exception that you are setting up for a certain time period, enter a numeric value for the period of time that you want to assess the exception. Then mark the appropriate Unit value. |
| Circulation Rule       | If your library has set up circulation rules, enter or choose the code for the circulation privilege rule you want to apply to this circulation parameter exception. (For more information, contact SirsiDynix support.) |

**Setting Up or Editing Basic Circulation Policies**

When you set up basic circulation policies, the process includes setting up these privileges:

- **Loan Period.** The length of time for which most borrowers can check out most items. (For more information, see “Controlling Due Dates” on page S-66.)
- **Grace Period.** The length of time that most items can be overdue before Horizon adds a fine to the borrower record. In determining a grace period, Horizon considers only loan periods when your library is open. (For more information, see “Setting Up Fines, Fees, and Suspensions” on page S-71.)
- **Fine Rate.** The fine amount most borrowers must pay for most overdue items per specified time period. You can specify a minimum and maximum fine amount in each ITYPE record. (For more information, see “Setting Up Fines, Fees, and Suspensions” on page S-71.)

**IMPORTANT**

You set up many individual circulation policies within Horizon. You may also need to set up other functionality to correctly regulate how Horizon manages these policies. (For more information, check the specific tasks in this guide that relate to the circulation settings you want to make.)
Setting Up a Location to Allow Loans

You can specify which locations can loan library items. This lets you set up some locations (such as reading rooms) from which items cannot circulate to borrowers.

Before You Begin

Make sure you have set up these views:

- **Location.** Set up a location in Horizon for each location you have. (For instructions, see “Library Locations” in the “General Setup” chapter of the System Administration Guide.)
- **Itype.** (For instructions, see “Preparing Horizon to Work with Item Records” on page S-6.)
- **Btype.** (For instructions, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)

You must create locations, ITYPEs, and BTYPEs. Whenever you create a new location, ITYPE, or BTYPE code, Horizon creates a group that contains that code. You can also choose to create your own groups that contain multiple codes. This lets you apply circulation privileges and parameters to more than one location, ITYPE, or BTYPE at a time. (For more information, see “Creating or Editing Groups to Define Circulation Privileges and Parameters” on page S-52 and “Setting Up Circulation Privileges and Parameters” on page S-51.)
To set up a location to allow loans

1. Set up loans allowed (circulation parameter 32).
   For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.

2. In the Value field, do one of these options:
   - If you want to allow loans from this location group, enter “1”.
   - If you do not want to allow loans from this location group, enter “0” (zero).

3. If you want to create or edit any exceptions, do these steps in the Special Values group:
   1. Choose the exception that you want to change, or create a new exception.
   2. Enter or choose a code in one or more of the location, borrower type, or item type group fields.
   3. In the Value field, do one of these options:
      - If you want to allow loans from the group, enter “1”.
      - If you do not want to allow loans from the group, enter “0” (zero).

   **NOTE**
   The exception value set here overrides the default value for this parameter.

4. Save your changes.

Controlling Due Dates

Before your library circulates items, you need to set up default due dates and any necessary exceptions to those due dates. You need to do this for each library location you have defined. When borrowers check out items, Horizon calculates and displays the date when the item should be returned based on these settings:

- **Loan period.** This setting defines the length of time for which an ITYPE can be checked out to a BTYPE. You must set up a default loan period and any exceptions to that default for each location.
  
  You may want to define some ITYPES or ITYPE groups that may not be checked out by any borrower. You may also want to define other ITYPES or ITYPE groups that may be checked out to some but not all borrowers. You assign a loan period of “0” (zero) to an ITYPE that does not circulate. If only certain BTYPES cannot check out an ITYPE, you include both the BTYPE and the ITYPE with a loan period of “0” (zero) in the same exception.

- **Fixed and Final Due Dates.** This setting specifies a due date that takes effect when items are checked out after a set date. A final due date specifies a date when all items are due. An indefinite (permanent) loan is a special kind of fixed due date that lets a library assign an item to a borrower for an indefinite length of time.
Once set up, the loan period, exceptions, and fixed and final due dates determine due dates in Circulation. This table shows examples of due dates using specific settings:

<table>
<thead>
<tr>
<th>Loan Unit</th>
<th>Default Loan Period</th>
<th>Loan Period Exception</th>
<th>Fixed Due Date/After</th>
<th>Final Due Date/After</th>
<th>Checkout Date</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>day</td>
<td>14</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>3-12-02</td>
<td>3-26-02</td>
</tr>
<tr>
<td>hour</td>
<td>2</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>8:00 a.m.</td>
<td>10:00 a.m.</td>
</tr>
<tr>
<td>day</td>
<td>14</td>
<td>7</td>
<td>none</td>
<td>none</td>
<td>3-12-02</td>
<td>3-19-02</td>
</tr>
<tr>
<td>day</td>
<td>14</td>
<td>0</td>
<td>none</td>
<td>none</td>
<td>not allowed</td>
<td></td>
</tr>
<tr>
<td>day</td>
<td>14</td>
<td>none</td>
<td>8-31-02/2-11-02</td>
<td>none</td>
<td>3-12-02</td>
<td>8-31-02</td>
</tr>
<tr>
<td>day</td>
<td>14</td>
<td>none</td>
<td>none</td>
<td>12-15-02/9-01-02</td>
<td>3-12-02</td>
<td>3-26-02</td>
</tr>
<tr>
<td>day</td>
<td>14</td>
<td>21</td>
<td>none</td>
<td>12-15-02/9-01-02</td>
<td>12-1-02</td>
<td>12-15-02</td>
</tr>
</tbody>
</table>

This section explains these topics:

- Defining Policies that Control Due Dates
- Specifying a Fixed or Final Due Date

**Defining Policies that Control Due Dates**

Before your library circulates items, you need to do several tasks, including setting up the policies that control due dates. You can set up a basic loan period for each location. You can also choose to suspend circulation privileges for BTYPEs with overdue items. If you want to, you can used fixed or final due dates in addition to or instead of basic loan periods. Once set up, the loan period, exceptions, and fixed and final due dates determine due dates in Circulation.

**To define policies that control due dates**

1. Define ITYPEs.
   (For instructions, see “Preparing Horizon to Work with Item Records” on page S-6.)

2. Define BTYPEs.
   (For instructions, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)

3. Set up these circulation privileges for each location:
   - Default loan period, including any exceptions.
   - Suspended circulation privileges days for various BTYPEs, if necessary.
   (For instructions, see “Setting Up Circulation Privileges and Parameters” on page S-51.)

4. Set up any applicable fixed or final due dates.
   (For instructions, see “Specifying a Fixed or Final Due Date” on page S-68.)
## Specifying a Fixed or Final Due Date

Fixed and final due dates let you set specific dates for when items should be due. These types of due dates override the due dates that Horizon calculates using the loan periods that you set up for each location.

A **fixed due date** overrides loan periods by specifying a due date that takes effect when items are checked out after a set date. (For example, academic libraries may want items checked out after March 1 due back at the end of the winter term on April 15.) Here is an example:

### Fixed Due Date

<table>
<thead>
<tr>
<th>March 1 After date</th>
<th>March 5 CKO</th>
<th>April 5 Fixed due date</th>
<th>April 15</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>10 days</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>40 days</td>
<td></td>
</tr>
</tbody>
</table>

In this example, the “after date” is March 1. Items checked out after this date are due on April 15, regardless of the loan period of 14 days. An item checked out on March 5 is due on April 15. This overrides the 14-day loan period, extending the loan period to 40 days. An item checked out on April 5 is also due on April 15. Again, this overrides the 14-day loan period. However, in this case the loan period is shortened to 10 days.

You can have several fixed due dates by specifying dates after which the fixed date should take effect. Fixed due dates can offer an alternative to loan periods.

An indefinite (permanent) loan is a special kind of fixed due date. An indefinite loan lets a library assign an item to a borrower for an indefinite length of time. However, the library may still allow and handle other loans on these indefinitely loaned items. The library can check out the item from the borrower with the indefinite loan (the primary borrower) to another borrower (the secondary borrower). When the item is due, the library returns the item to the primary borrower instead of keeping it in the library.

If you use normal loan periods, you should set up fixed due dates as exceptions only to the normal loan periods. You can set up fixed due dates for ITYPE groups, BTYPE groups, and combinations of ITYPE and BTYPE groups. You can set up fixed and final due dates in two separate areas of Horizon, but either setup has the same effect.

A **final due date** specifies a date when all items are due. This final due date overrides the loan period when the end of the loan period falls after the final due date. (For example, when the final due date for a BTYPE is April 15 and a borrower checks out an item with a 14-day loan period on April 10, the item is due on April 15th, regardless of the 14-day loan period.) Here is an example:

### Final Due Date

<table>
<thead>
<tr>
<th>March 15 CKO</th>
<th>March 29 Due</th>
<th>April 10 CKO</th>
<th>April 15 final due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 days</td>
<td></td>
<td>5 days</td>
<td></td>
</tr>
</tbody>
</table>

In this example, the final due date does not affect the item checked out on March 15. However, the item checked out on April 10 is due on April 15, giving the item only a five-day loan period.

Academic libraries may want to use a final due date to ensure that all items are returned by a certain date (for example, by the end of the semester).

This section includes these tasks:
To specify a fixed or final due date in the due_date view

1. Open the due_date view in the Table Editor.
2. Choose the due date that you want to change, or create a new due date.
   Horizon displays the Edit Fixed or Final Due Dates window:

3. Complete or update these fields (you can enter information in any or all of the fields):

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter or choose the code for the location where the fixed due date applies.</td>
</tr>
<tr>
<td>Borr. Type</td>
<td>Enter or choose the code for the BTYPE to which the due date setting applies.</td>
</tr>
<tr>
<td>Item Type</td>
<td>Enter or choose the code for the ITYPE to which the due date setting applies.</td>
</tr>
<tr>
<td>After Date</td>
<td>Enter the date after which the due date should take effect.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Enter the due date you want to use.</td>
</tr>
<tr>
<td></td>
<td>This due date overrides default or excepted loan periods if items are checked out after the After Date.</td>
</tr>
<tr>
<td></td>
<td>If you want to set up the loan period for an indefinite or permanent loan, set the Fixed Due Date to an “artificial” date, such as 12/31/2050. Horizon recognizes this date as indefinite and displays it as such in Horizon and on receipts.</td>
</tr>
</tbody>
</table>
To specify a fixed or final due date in the location view

1. Open the location view in the Table Editor. Horizon opens the List Location Parameters window.
2. Choose the location for which you want to set due dates. Horizon displays the Edit Location Parameters window.
3. Display the Due Dates group:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Fixed         | Do one of these options:  
• If the due date is fixed, mark the box.  
• If the due date is final, clear the box. |

4. Choose the due date item that you want to change, or create a new due date item.
5. Complete or update any or all of these fields in the Due Date group (click New to add multiple due dates):

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borr. Type</td>
<td>Enter or choose the code for the BTYPE to which the due date setting applies.</td>
</tr>
<tr>
<td>Item Type</td>
<td>Enter or choose the code for the ITYPE to which the due date setting applies.</td>
</tr>
<tr>
<td>After Date</td>
<td>Enter the date after which the due date should take effect.</td>
</tr>
</tbody>
</table>

4. Save your changes.
### Setting Up Fines, Fees, and Suspensions

Occasionally, borrowers bring back items late or lose items that they have checked out. You can set up Horizon to automatically calculate overdue fines, add lost processing fees, or suspend circulation rights for borrowers who have overdue items. You can also have Horizon charge overdue fines when a borrower returns an overdue item and another borrower checks out the item before you have checked in the item.

This section explains these topics:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>Enter the due date you want to use. This due date overrides default or excepted loan periods if items are checked out after the After Date. If you want to set up the loan period for an indefinite or permanent loan, set the Fixed Due Date to an “artificial” date, such as 12/31/2050. Horizon recognizes this date as indefinite and displays it as such in Horizon and on receipts.</td>
</tr>
</tbody>
</table>
| Fixed         | Do one of these options:  
  - If the due date is fixed, mark the box.  
  - If the due date is final, clear the box. |

6 Save your changes.

### Letting Staff Choose the Checkout Period Around Expiration Dates

Horizon can be configured to prompt library staff to choose whether to truncate the loan period to the borrower’s card expiration date or allow the user to complete the full loan period even if the loan period goes past the expiration date, to always give the full loan period, or to truncate the loan period automatically.

#### To specify the options available for staff

1 Open the Horizon client and log in.
2 Go to **Administration > Table Editor**.
3 Select the **location** table, and then click **OK**.
4 Click **Page Down** to get to page 3 of the table fields.
5 For the **Expiring Borrower CKO Loan Period** field, select one of these options:  
  - **Prompt**. Specifies that the system always asks a staff member what to do if the loan period will extend past the borrower’s card expiration date.  
  - **Truncate**. Specifies that the system should automatically shorten the loan period to the borrower’s card expiration date.  
  - **Full**. Specifies that the system should always give the full loan period, even if it extends past the borrower’s card expiration date.
6 Click **Save** to save your settings, and then click **Close** to close the window.
Setting Up or Editing Basic Circulation Policies

- Setting Up Fines
- Understanding Minimum and Maximum Fines
- Setting Up a Grace Period
- Setting Up a Lost Processing Fee
- Setting Up Overdue Charges for Overlapping Circulations
- Setting Up Fees for 3M SelfCheck
- Charging Fines for Expired Holds
- Setting Up Restrictions for a Floating Collection
- Suspending a Borrower’s Circulation Rights

Setting Up Fines

Fines are the amounts your library charges borrowers for overdue items. Once you set them up, the loan period, grace period, fine amount, exceptions, closed library days, and maximum and minimum fine amounts determine how much Horizon charges borrowers for overdue items.

You can turn off fine calculation for days that your library is closed. (For example, if your library is closed on weekends, you can set Horizon to not apply fines to overdue items on Saturdays and Sundays.)

This chart shows fine amounts for several situations:

<table>
<thead>
<tr>
<th>Loan Unit</th>
<th>Grace Period</th>
<th>Fine Rate</th>
<th>Closed Days</th>
<th>Fines Charged on Closed Days</th>
<th>Fines Charged on Grace Days</th>
<th>Min Fine</th>
<th>Max Fine</th>
<th>Days/Hrs Overdue</th>
<th>Total Charge</th>
</tr>
</thead>
<tbody>
<tr>
<td>day 0</td>
<td>0</td>
<td>$0.10</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>0</td>
<td>$5.00</td>
<td>3</td>
<td>$0.30</td>
</tr>
<tr>
<td>day 2</td>
<td>2</td>
<td>$0.50</td>
<td>Sun</td>
<td>no</td>
<td>yes</td>
<td>0</td>
<td>$5.00</td>
<td>10</td>
<td>$5.00</td>
</tr>
<tr>
<td>day 2</td>
<td>2</td>
<td>$0.50</td>
<td>Sun</td>
<td>yes</td>
<td>no</td>
<td>0</td>
<td>$5.00</td>
<td>10</td>
<td>$4.00</td>
</tr>
<tr>
<td>day 2</td>
<td>2</td>
<td>$0.50</td>
<td>Sun</td>
<td>no</td>
<td>yes</td>
<td>0</td>
<td>$5.00</td>
<td>20</td>
<td>$5.00</td>
</tr>
<tr>
<td>day 3</td>
<td>3</td>
<td>$0.25</td>
<td>n/a</td>
<td>no</td>
<td></td>
<td>$0.50</td>
<td>$5.00</td>
<td>4</td>
<td>$0.50</td>
</tr>
<tr>
<td>day 3</td>
<td>3</td>
<td>$0.25</td>
<td>n/a</td>
<td>yes</td>
<td></td>
<td>0</td>
<td>$25.00</td>
<td>7</td>
<td>$1.75</td>
</tr>
<tr>
<td>day 3</td>
<td>3</td>
<td>$0.25</td>
<td>n/a</td>
<td>no</td>
<td></td>
<td>$0.50</td>
<td>$25.00</td>
<td>7</td>
<td>$1.00</td>
</tr>
<tr>
<td>hour 0</td>
<td>0</td>
<td>$1.00</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td>0</td>
<td>$5.00</td>
<td>3</td>
<td>$3.00</td>
</tr>
<tr>
<td>hour 5</td>
<td>5</td>
<td>$1.00</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td>$5.00</td>
<td>$30.00</td>
<td>24</td>
<td>$24.00</td>
</tr>
<tr>
<td>hour 5</td>
<td>5</td>
<td>$1.00</td>
<td>n/a</td>
<td>yes</td>
<td></td>
<td>$5.00</td>
<td>$15.00</td>
<td>24</td>
<td>$15.00</td>
</tr>
</tbody>
</table>
This chart more specifically indicates how grace periods and minimum fines apply to overdue items:

<table>
<thead>
<tr>
<th>Loan Unit</th>
<th>Grace Period</th>
<th>Fine Rate</th>
<th>Min. Fine</th>
<th>Day 1</th>
<th>Days 2-7</th>
<th>Day 8 Total</th>
<th>Additional Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>day</td>
<td>$0.25</td>
<td>$0.25</td>
<td>$0.25</td>
<td>+$0.25 daily</td>
<td>$2.00</td>
<td>+$0.25 daily (day 9 = $2.25)</td>
<td></td>
</tr>
<tr>
<td>day</td>
<td>$0.25</td>
<td>$1.00</td>
<td>$1.00</td>
<td>+$0.25 daily</td>
<td>$2.75</td>
<td>+$0.25 daily (day 9 = $3.00)</td>
<td></td>
</tr>
<tr>
<td>day</td>
<td>7</td>
<td>$0.25</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.25</td>
<td></td>
<td>+$0.25 daily (day 9 = $0.50)</td>
</tr>
<tr>
<td>day</td>
<td>7</td>
<td>$0.25</td>
<td>$1.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$1.00</td>
<td>remains at $1.00 until day 11, then +$0.25 daily (day 11 = $1.25)</td>
</tr>
</tbody>
</table>

**NOTE**

Items on recall can have a different fine amount. (For more information, see “Setting Recall Rules” on page S-133.)

**To set up fines**

1. Define ITYPES.
   (For instructions, see “Preparing Horizon to Work with Item Records” on page S-6.)
   You may want to include minimum and maximum fine amounts in your ITYPE definition. (For more information, see “Understanding Minimum and Maximum Fines” on page S-74.)

2. Define BTYPEs.
   (For instructions, “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)
   You may want to include information in these fields:
   - Fee Notice Type
   - Max. Unpaid Fines
   - Max. Days Acct. Overdue

3. Set up locations, including these areas (for instructions, see “Library Locations” in the “General Setup” chapter of the *System Administration Guide*):
   - Daily Hours group
   - Holidays group
   - If you want to charge fines for days your library is closed, mark the **Charge for Closed Days** field.
   - If you want to charge fines for grace days when an item is returned after the grace period ends, mark the **Charge for Grace Days** field; if you never want to charge fines for grace days, clear the field.
   (For more information, see “Setting Up a Grace Period” on page S-75.)

4. Set up these circulation privileges:
• Loan periods and exceptions.
  (For instructions, see “Controlling Due Dates” on page S-66.)

• Fine amounts and exceptions.
  A fine amount is the sum of money charged for each loan period that the item is overdue. (For example, an ITYPE with a loan period of one day and a fine amount of 25 cents would be charged 50 cents if the item is two days overdue.)

• Grace periods and exceptions (optional).
  A grace period is the length of time Horizon waits before beginning to charge fines for an overdue item. In determining a grace period, Horizon considers only loan periods when your library is open. (For more information, see “Setting Up a Grace Period” on page S-75.)

(For instructions on setting up circulation privileges, see “Setting Up Circulation Privileges and Parameters” on page S-51.)

5 Set up a lost processing fee (circulation parameter 46) (optional).
  A lost processing fee is a fee your library may assess to cover the cost of processing a lost item, including finding and processing a replacement.
  (For instructions, see “Setting Up a Lost Processing Fee” on page S-78.)

Understanding Minimum and Maximum Fines

You can specify the range of the fine amounts your library charges. (For example, you may want most borrowers to pay a $0.50 overdue fine the first day an item is considered overdue. You may also want to specify that a borrower’s overdue fine for each item that they check out cannot exceed $20.00.) You specify fine ranges by defining minimum and maximum fine amounts.

The minimum fine amount is the initial amount a borrower must pay for an item as soon as it is overdue. This amount applies to the first loan period you have defined (for example, one day or one hour). This amount remains the same until the regular fine amount you define would have reached the minimum fine amount. Then the regular fine amount applies for each subsequent loan period that the item is overdue. (For example, if your minimum fine amount is $0.50 and your daily fine rate is $0.10, the fine would be $0.50 on the first day after the grace period and remain at $0.50 for the fifth day. That would make the daily fine rate equal the minimum fine rate [$0.10 times five days]. After that, Horizon increases the fine by $0.10 for each additional day that the item is overdue.)

If you set up a grace period and do not charge fines for those grace days, a minimum fine amount does not take effect until the first day after the grace period. However, the grace period days are counted when Horizon calculates how much the regular fine amount would be. (For example, if your minimum fine amount is $0.50 and your daily fine rate is $0.10 with a three-day grace period, the fine would be $0.50 on the first day after the grace period [the fourth day] and remain at $0.50 for the fifth day. That would make the daily fine rate equal the minimum fine rate [$0.10 times five days]. After that, Horizon increases the fine by $0.10 for each additional day that the item is overdue.) (For more information on how a grace period affects a minimum fine, see “Setting Up a Grace Period” on page S-75.)

In addition to a minimum fine amount, you have the option to specify a maximum fine amount that keeps fines for a given ITYPE from going higher than a certain amount. A maximum fine amount is determined by specifying one of these things:

• A fixed dollar amount.
• A percentage of the cost of an item. If an item record has no cost indicated, Horizon figures the percentage from the average replacement cost listed in an item’s collection code.

When an overdue fine reaches either the fixed dollar amount or the percentage of the cost of the item, the fine stops increasing.
You set up minimum and maximum fine amounts in the itype view. (For more information, see “Preparing Horizon to Work with Item Records” on page S-6.)

**Setting Up a Grace Period**

Your library can choose to add a grace period to the item loan period. A grace period is the number of loan periods that Horizon waits before beginning to charge fines for an overdue item. In determining a grace period, Horizon considers only loan periods when your library is open.

If you decide to use grace periods, you need to set up a default grace period and any exceptions to that default. You can choose to not offer a grace period by entering “0” (zero) in the Default or Exceptions Value fields. (For instructions on setting up the grace period privilege, see “Setting Up or Editing a Circulation Privilege” on page S-55.)

You can set up Horizon to charge fines for grace days once the grace period is over if an item is still overdue. You can also choose whether to charge fines for days when your library is closed. These two settings can work separately or together. However, in determining a grace period, Horizon considers only those loan periods when your library is open.

If a borrower returns an item during the regular loan period or the grace period, Horizon does not charge a fine on the item. If a borrower returns an item after the grace period passes, you can choose to have Horizon ignore the grace period in the fine calculation. (Ignoring the grace period in the fine calculation effectively extends the due date by the number of days of grace.) The Charge for Grace Days field in the location view controls whether fines are charged for grace periods. By default, Horizon comes with this functionality turned on.
Setting Up or Editing Basic Circulation Policies

Using a Grace Period without Closed Days

This section gives an example of how you might use a grace period without closed days. The table describes what happens when an item is due on the first of the month and you have a grace period of two days with a fine rate of $0.25 per day. There are no closed days:

<table>
<thead>
<tr>
<th>Number of days the item is overdue</th>
<th>Fine amount if the library charges for the grace period</th>
<th>Fine amount if the library does not charge for the grace period</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Two</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Three</td>
<td>$0.75</td>
<td>$0.25</td>
</tr>
<tr>
<td>Four</td>
<td>$1.00</td>
<td>$0.50</td>
</tr>
</tbody>
</table>

Using a Grace Period with Closed Days

In addition to choosing whether to charge for grace periods, you can choose to exclude from overdue fine calculation those days that your library is closed. (For example, if your library is closed on Sundays, you can set Horizon to not apply fines for the closed days.) The Charge for Closed Days field in the location view controls whether fines are charged for closed days. This section gives examples of how you might use a grace period with closed days.

Example 1

Suppose you do not calculate fines for closed days or grace periods. (Grace periods are calculated only as time periods when your library is open.) An item has a two-hour grace period and is due at 10:00 pm; the library closes at 11:00 pm, and reopens at 8:00 am the next morning. The item is checked in at 11:00 am, making it two hours overdue past the grace period. If the fine rate is $0.25 per hour, the borrower is charged $0.50. If the fine rate is $0.25 a day, the borrower is charged $0.25.

Example 2

Suppose an item is due on Saturday the 1st. The item has two grace days, and the library is closed on Sundays. The fine rate is $0.25 per day. The item is checked in on the 5th. Because grace days are always open days, the grace period makes the item’s due date Tuesday the 4th. This table describes what happens with different combinations of grace and closed day charges:

<table>
<thead>
<tr>
<th>If the library charges for grace days</th>
<th>and the library charges for closed days</th>
<th>then the item is four days overdue and the fine is $1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>charges for grace days</td>
<td>does not charge for closed days</td>
<td>three days overdue and the fine is $0.75</td>
</tr>
<tr>
<td>does not charge for grace days</td>
<td>charges for closed days</td>
<td>one day overdue and the fine is $0.25</td>
</tr>
<tr>
<td>does not charge for grace days</td>
<td>does not charge for closed days</td>
<td>one day overdue and the fine is $0.25</td>
</tr>
</tbody>
</table>
Example 3

Suppose you have a fine rate of $0.25, a minimum fine amount of $1.00, and a grace period of three days. Horizon would charge these fines:

<table>
<thead>
<tr>
<th>Days overdue</th>
<th>Fine charged if there is no charge for grace periods</th>
<th>Fine charged if there is a charge for grace periods</th>
</tr>
</thead>
<tbody>
<tr>
<td>First through third day overdue</td>
<td>grace period—no charge</td>
<td>$1.00</td>
</tr>
<tr>
<td>Fourth day overdue</td>
<td>$1.00</td>
<td>$1.00</td>
</tr>
<tr>
<td>Fifth day overdue</td>
<td>$1.00</td>
<td>$1.25</td>
</tr>
<tr>
<td>Sixth day overdue</td>
<td>$1.00</td>
<td>$1.50</td>
</tr>
<tr>
<td>Seventh day overdue</td>
<td>$1.00</td>
<td>$1.75</td>
</tr>
<tr>
<td>Eighth day overdue</td>
<td>$1.25</td>
<td>$2.00</td>
</tr>
<tr>
<td>Ninth day overdue</td>
<td>$1.50</td>
<td>$2.25</td>
</tr>
</tbody>
</table>

You can set up loan periods, fine rates, and grace periods in various combinations. Although it is not standard library practice, you can have a daily loan period with an hourly grace period, and a fine rate of either daily or hourly. You can also have an hourly loan period with daily grace periods. Each daily grace period would add 24 hours to the due time or date.

For example, suppose you do not calculate fines for closed days. An item has an hourly loan period with a one day (24 hour) grace period, and is due at 10:00 pm; the library closes at 11:00 pm, and reopens at 8:00 am the next morning. The item is checked in at 11:00 am. Because of the grace period, the item is not overdue.
Setting Up a Lost Processing Fee

Horizon lets your library assess lost processing fees to borrowers who lose items to cover the costs of processing and replacing those lost items. When a borrower reports an item lost, the library can assess a replacement cost and a processing fee. If the borrower later finds the item, the library can refund the replacement cost but keep the processing fee to recoup the costs involved in ordering the replacement item.

To set up a lost processing fee

1. Set up **lost processing fee** (circulation parameter 46).
   
   For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.

2. In the **Value** field, enter the monetary value for the default lost processing fee you want to apply.

3. If you want to create or edit any exceptions, do these steps in the **Special Values** group:

   1. Choose the exception that you want to change, or create a new exception.
   2. Enter or choose a code in one or more of the location, borrower type, or item type group fields.
   3. In the **Value** field, enter the monetary value for the lost processing fee exception you want to apply.

   **NOTE**
   
   The exception value set here overrides the default value for this parameter.

4. Save your changes.

Setting Up Overdue Charges for Overlapping Circulations

There are occasions when Horizon shows that an item is checked out to one borrower, but you check out that item to a second borrower. If the item was overdue, you can have Horizon charge overdue fines to the first borrower.

To set up overdue charges for overlapping circulations

1. Set up **charge overdue if item checked out while overdue for another borrower** (circulation parameter 41).
   
   For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.

2. In the **Value** field, do one of these options:

   - If you want to charge overdue fines for items that are checked out to a second borrower while they are still marked as overdue for another borrower, enter “1”.
   - If you do **not** want to charge fines for items you check out to a second borrower, enter “0” (zero).
3  If you want to create or edit any exceptions, do these steps in the **Special Values** group:

1. Choose the exception that you want to change, or create a new exception.
2. Enter or choose a code in one or more of the location, borrower type, or item type group fields.
3. In the **Value** field, do one of these options for the exception you want to apply:
   - If you want to charge overdue fines for the exception, enter "1".
   - If you do **not** want to charge overdue fines for the exception, enter "0" (zero).

**NOTE**

The exception value set here overrides the default value for this parameter.

4  Save your changes.

### Setting Up Fees for 3M SelfCheck

If you use 3M SelfCheck, you can set up a checkout processing fee (circulation parameter 47) in Horizon to charge borrowers a checkout processing fee when they check out their own items. (For instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. For more information on 3M SelfCheck, see the **3M SelfCheck Guide**.)

### Charging Fines for Expired Holds

Horizon allows you to charge fines for holds that expire before being picked up or that are never picked up.

**To set up fines for expired hold**

1. Open the Horizon client and log in.
2. Go to **Administration > Table Editor**.
3. Select the **circ_parameter** table, and then click **OK**.
4. Select the **Filled hold expiration fine** parameter, and then click **Edit**.
5. Type the fine rate in the **Value** field. The rate is based on your selection for the **Unit** field (per incident, per day, per hour, or per minute).
6. For example, type **50** to charge 50 cents

**NOTE**

This fine is added to the patron record during Day End processing when a hold expires.

### Setting Up Restrictions for a Floating Collection

If you have a Floating Collection, you can set up the floating collection restriction (circulation parameter 56) in Horizon to restrict or allow what items in the collection float based on item type, item location, or circulation location.
This setting allows you to further restrict the setting in Collection Codes (for more information, see “Setting Up a Floating Collection” in the Collections section of the General Setup chapter in the Horizon System Administration Guide). So, floating collections may be set to be allowed in Collection Codes, but with parameter 56 you can set it to be restricted for certain situations.

You can set up exceptions or allowances for circulation of floating collection material, depending on how you want it to work. For example, you can set up to allow floating, but then restrict floating to certain types of books. Or, set up to disallow floating except with a certain library location.

To set up restrictions for a floating collection

1. Set up floating collection restriction (circulation parameter 56).
   For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.

2. In the Value field, do one of these options:
   - If you want to allow floating circulation with some restrictions, enter “1”.
   - If you want to restrict circulation apart from a few allowances, enter “0” (zero).

3. If you want to create or edit any exceptions or allowances, do these steps in the Special Values group:
   1. Choose the exception that you want to change, or create a new exception.
   2. Enter or choose a code in one or more of the circulation location, item Location, or item type group fields.

   **NOTE**
   The exception value set here overrides the default value for this parameter.

4. Save your changes.

**Suspending a Borrower’s Circulation Rights**

If a borrower has items that are overdue, in addition to charging fines, you can suspend that borrower’s circulation rights.

**NOTE**
If a borrower’s circulation rights are suspended, circulation staff cannot override the suspension and check out items to that borrower.

To suspend a borrower’s circulation rights

1. Set up the Days of Suspension circulation privilege.
   (For instructions, see “Setting Up or Editing a Circulation Privilege” on page S-55.)
2 In the Default field, enter the number of days for which you want Horizon to suspend a borrower's circulation privileges.

**NOTE**

Even if you designate an hour or minute time period for the default or exception unit, Horizon suspends circulation rights for a number of days.

The number you enter is multiplied by the number of days that the item is overdue. (For example, if borrower suspension is set at “5” and an item is three days overdue, Horizon suspends borrowing privileges for three times five, or fifteen, days.)

If you do not want to implement circulation suspension for borrowers with overdue items, enter “0” (zero).

3 If you want to create or edit any exceptions, do these steps in the Special Values group:

1 Choose the exception that you want to change, or create a new exception.
2 Enter or choose a code in one or more of the location, borrower type, or item type group fields.
3 In the Value field, enter the number of days for the suspension exception you want to apply.

**NOTE**

The exception value set here overrides the default value for this parameter.

4 Save your changes.

### Setting Up Self-Serve Checkout

If you want to, you can set up a workstation that borrowers can use to check out library items to themselves. Your library can run Horizon Self-Serve Checkout by starting the process from the navigation bar. (For more information, see “Checking Out an Item Using Horizon Self-Serve Checkout” in the “Checkout and Checkin” chapter of the Circulation Guide.)

You can set up Self-serve Checkout so that borrowers must enter a borrower barcode for each item that they check out. You can also set the amount of time that Self-Serve waits between borrower keystrokes before requiring the new entry of a borrower barcode.

**NOTE**

You can edit self-check block messages. (For more information, see “Editing a Self-Serve Checkout Message Block” on page S-93.)

This section explains these topics:

- Requiring a Borrower Barcode for Each Self-Serve Transaction
- Adjusting the Time-out Period for Self-Serve Checkout
Setting Up Self-Serve Checkout

Requiring a Borrower Barcode for Each Self-Serve Transaction

You can set up Self-serve Checkout so that it requires a borrower to enter his or her borrower code for each item checked out in a single session. This can help prevent another borrower from checking out an item using the previous borrower’s barcode.

To require a borrower barcode for each Self-Serve transaction

1. Choose Tools, Customize Launcher.
2. Click the Navigation Bar tab.
3. In the model navigation bar window, highlight the Self-serve Checkout process. Horizon displays “Self-serve Checkout” in the Label field.
4. In the Arguments field, enter “/1”. This switch specifies that borrowers must enter a barcode for each item they check out in Self-Service Checkout.
5. Click OK to save your changes.

Adjusting the Time-out Period for Self-Serve Checkout

A Self-Serve Checkout station waits for a specified time period between keystrokes before it resets and requires a borrower login. This lets a borrower work in a self-checkout session without having to re-enter a borrower barcode as long as they press a key within the specified time period. Your system administrator can adjust the time-out period.

To adjust the time-out period for Self-Serve Checkout

1. Open the menu_option view in the Table Editor. Horizon displays the List Menu Options window.
2. Double-click SelfCKO. Horizon displays the Edit Menu Options window:
3 In the **Arguments** field, change the value to the number of seconds that you want Horizon Self-Serve Checkout to wait before requiring a new borrower login. (For example, if you want Horizon to wait for five seconds before resetting, enter “/t=5”. The default time period is ten seconds.

**NOTE**

To require the borrower barcode for each item AND provide a 5 second time out, you’d place both arguments together separated by a space: "/1 /t=5"

4 Save your changes.
Setting Up Borrower Self-Registration for Use with Information Portal

If your library wants to let borrowers self-register for a temporary barcode, you need to do some setup in both Horizon and Horizon Information Portal. (For instructions on setting up Information Portal, see “Setting Up Borrower Self-Registration” in the “Changing the Setup” chapter of the Information Portal System Administrator’s Guide.)

Before You Begin

- If you want to, set up a special BTYPE that you want Horizon to use for self-registered borrowers.
  For example, you could create a special BTYPE for self-registered borrowers that expires in a shorter length of time and limits the number of requests that the self-registered borrower can make. (For instructions, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)
- If you want to collect statistics about self-registered borrower records, set up a self-registered borrower statistical class (BSTAT). (For instructions, see “Borrower Statistical Classes [BSTATs]” in the “General Setup” chapter of the System Administration Guide.)
- If the Stat Classes group does not display on your borrower records, you can add it. (For instructions, see “Adding a Group to a View” in the “Introduction to Horizon Views” chapter of the System Administration Guide.) In the Linked View field, enter “borrower_bstat”. In the Link Column(s) field, enter “borrower#”.

To set up borrower self-registration for use with Information Portal

1. Open the location view in the Table Editor.
   Horizon opens the List Location Parameters window.
2. Choose the location for which you want to set up borrower self-registration for use with Information Portal.
   Horizon displays the Edit Location Parameters window.
3. Click Page Down or resize the window to display the Self-Registered BType field:

   ![Edit Location Parameters Window]

   - Hold Shelf Expiry includes Closed days
   - Master Location
   - Self-Registered BType
   - Self-Registered Borrower Stat Class
   - All Items out Display type
   - Suppressed Items
   - Suppressed or Items

   Close Save Page Up Page Down
Complete or edit these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Enter this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Registered BType</td>
<td>Enter or choose the BTYPE that you want to use for self-registered borrowers.</td>
</tr>
<tr>
<td>Self-Registered Borrower Stat Class</td>
<td>Enter or choose the BSTAT that you want to use to collect information about self-registered borrowers. Horizon assigns this BSTAT to each self-registered borrower record when it is created.</td>
</tr>
</tbody>
</table>

NOTE

Information Portal 4.0 requires that you complete the BStat field in the location table in order for borrower self-registration to work.

Save your changes.
Setting Up Blocks

In Circulation, a block is a flag that interrupts the checkout process to inform circulation staff of a message for a borrower, a problem with a borrower (such as a notice of payment due for lost or overdue items), or an unresolved status for an item (such as lost). If you use a self-serve checkout option, blocks can also interrupt the self-serve checkout process (for example, to remind a borrower to verify their address or renew their registration at the circulation desk).

Horizon uses these general types of blocks:

**System-generated Blocks.** These are blocks that Horizon automatically places on a borrower’s record when circulation limits or borrower-type privileges are exceeded, or when a self-serve checkout borrower needs to talk to a staff member. These blocks include overdues, fines for overdues, and hold notification. You cannot delete these predefined blocks, but you can edit some of their settings, including these:

- The number of days the block remains in the borrower’s history file after it has been resolved.
- The action taken to notify the borrower of the problem.
- The message that displays on any notice sent about the block.
- Which block types sort to the top of the list regardless of the sort type for blocks that library staff chooses. If there are multiple blocks of the same type, Horizon sorts them within the type group by the chosen sort type.

  For example, if you set messages to sort with a priority of “1,” Horizon sorts all messages at the top of the block list. If the borrower has multiple fines and library staff chooses a sort by item, Horizon displays the fines under the messages. The fines display according to item barcode.

(For a description of each system-generated block, see “System-Generated Blocks” in the “Blocks” chapter of the Circulation Guide.)

**Library-defined Blocks.** These are blocks that circulation staff manually places on a borrower’s record, such as fees owed other than overdue fines, or special messages.

Most library-defined blocks consist of amount-type blocks. Examples of amount-type blocks include fees (such as interlibrary loan fees), payments (such as credit card or check payment methods), waivers, and refunds.

You can specify the same settings for library-defined blocks as you specify for system-generated blocks. You can also specify these settings:

- The type of block (such as fee, payment, waiver, or refund).
- Any default amount.
- Any taxes to be calculated into the amount.
- Library-defined self-serve checkout Message Blocks.
You must set up any library-defined blocks before you can use them.

**NOTE**

Block type definitions link to Cash Management reports. In a Cash Management report, Horizon lists all defined fee types separately, and also includes a total for the category. (For example, a cash transaction summary would display separate amounts for circulation payments collected and fees refunded daily, monthly and yearly, as well as the totals collected for the category.) (For more information, see “Generating AdHoc Statistics” in the “Maintenance and Day End” chapter of the System Administration Guide and “Tracking a Cash Transaction” on page S-98.)

You can also choose to only print specific block notices, even if you have designated in Horizon that borrowers want to receive e-mail notices.

**NOTE**

You edit or define some maximum-type blocks (such as maximum items lost, maximum unpaid fines owed, or maximum overdue items) in the btype view for each borrower type. (For more information, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.) You edit or define other maximum-type blocks (such as maximum items out and maximum renewals allowed) in the circulation_privilege_code view for each location. (For more information, see “Setting Up Circulation Privileges and Parameters” on page S-51.)

This section explains these topics:
- Setting Up or Editing a Block Type
- Editing a Self-Serve Checkout Message Block
- Displaying Blocks from Another Location

### Setting Up or Editing a Block Type

You can set up block types for circulation staff to manually place on a borrower’s record. These types of blocks are usually amount-type blocks, such as fees owed other than overdue fines, or special messages. You can also edit some settings for system-defined blocks.

You can prevent Horizon from automatically deleting any blocks. You can also choose to display blocks in your PAC so that borrowers can see them when they view their borrower information. You can prohibit renewals on items with a certain type of block, and print notices for the block even if the borrower’s record is marked to receive notices by e-mail.

**NOTE**

If you set up e-mail notification for borrowers, you can specify the message that Horizon uses in e-mail for a block. (For more information, see “Specifying a Block E-mail Notice Message” on page S-163.)
When Horizon displays a borrower’s blocks in circulation, library staff can choose to sort the blocks in one of three ways:

- The order in which the blocks were created (this is the default)
- By item (sorts by item barcode and date)
- By related group (sorts by block type and date)

You can choose which block types sort to the top of the list regardless of the sort type that library staff chooses. If there are multiple blocks of the same type, Horizon sorts them within the type group by the chosen sort type.

For example, if you set messages to sort with a priority of “1,” Horizon sorts all messages to the top of the block list. If the borrower has multiple fines and library staff chooses a sort by item, Horizon still sorts the messages to the top of the screen; then it displays the fines sorted by item under the messages. The fines display according to item barcode.

**Before You Begin**

Make sure you have set up these views:

- **Location.** (For instructions, see “Library Locations” in the “General Setup” chapter of the System Administration Guide.)
- **Btype.** (For instructions, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)

**To set up or edit a block type**

| View: | block |

![Image of Edit Block Types dialog box]
### Setting Up or Editing a Block Type

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block Type</td>
<td>Enter a code that identifies the block type. This code can contain up to seven characters.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the block type code. This description should be unique for each block.</td>
</tr>
</tbody>
</table>
| Action         | Mark the appropriate button to specify what action is taken when the block is assigned to a borrower:  
|                | - **None.** No action. (Mark this option if you want to send invoices for fees.)                                                        |
|                | - **Print.** Causes Horizon to print a notice about the block or create an e-mail message to send to the borrower.                      |
|                | - **Review.** Adds the block to a review list for circulation staff to view in Circulation Reports before any other action is taken.    |
| Default Language| Enter the message that you want to display on notices sent for the block.  
|                | For example, you might use this as the default text for a final notice:  
|                | “This is your final notice to return the item(s) listed below. If we do not receive the material(s) within seven days, you will be billed for the replacement costs.”  
|                | Horizon displays this message in any of these circumstances:  
|                | - If the action type is “Print.”  
|                | - If no message has been specified in the block view’s Notice Language group for the borrower’s location.  
|                | - If a message has been specified in the block view’s Notice Language group and the Append box is marked.                          |
| Days History   | Enter the number of days that you want a block to remain in a borrower’s history file before Day End Processing deletes the block.  
|                | (For example, if you want Horizon to delete the block after it has been in the borrower’s history file for 90 days, enter “90”.)  
|                | Blocks can also be deleted manually by a staff member.  
|                | **IMPORTANT** Changing an item status from “Lost” to “Missing” breaks the link between the item and the borrower who lost it unless you set up this field. Then Horizon keeps the Lost block in history after the block is resolved (for example, after the item is paid for) until the time period you specify passes. (For more information on item statuses, see “Working with Item Statuses” on page S-11.) |
### Setting Up Blocks

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day-end No Purge</td>
<td>If you do not want Day End to delete any unresolved notes or blocks of this type, mark this box.</td>
</tr>
<tr>
<td>Horizon-defined?</td>
<td>This is a read-only field that specifies whether the block is system-defined. You cannot change or delete the Horizon-defined codes for blocks or notes.</td>
</tr>
<tr>
<td>PAC Display</td>
<td>If you want to display the block in your PAC when borrowers view their borrower information, mark this box.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: Horizon Information Portal does not need this field.</td>
</tr>
<tr>
<td>Amount Type</td>
<td>If the block deals with money, mark the appropriate Amount Type option. If you want to specify that this block applies no monetary amount and you want to remove the Amount field from the Edit Block window in Circulation, mark <strong>None</strong>. An amount type must be marked for any library-defined fee blocks. The Amount Type lets you track payments by type. <strong>Note</strong>: Some blocks automatically assign a fine amount determined by circulation privileges. (For example, Horizon automatically assesses overdue fines.) You should not manually enter or change these automatically-assigned fines (designated as “Horizon defined” in the block view).</td>
</tr>
<tr>
<td>Default Fee</td>
<td>Enter a default amount charged, paid, waived, or refunded for an amount-type block. (This field is optional. An example of a fee block that might have a default amount is an interlibrary loan fee.)</td>
</tr>
</tbody>
</table>
### Setting Up or Editing a Block Type

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter or choose the code for the location whose notice will display the alternate message. You can enter different messages for locations, BTYPEs, and combinations of the two.</td>
</tr>
<tr>
<td>Borrower Type</td>
<td>Enter or choose the code for the BTYPE to which the message will be sent. You can enter different messages for locations, BTYPEs, and combinations of the two.</td>
</tr>
<tr>
<td>Append</td>
<td>If you want to continue with the message in the Notice Language field (adding it to the end of the default message) instead of replacing the default message, mark this field. This field also applies to the Email Notice Language and Default Email Language fields of this view.</td>
</tr>
<tr>
<td>Notice Language</td>
<td>Enter the message to display on the notice in place of, or in addition to, the default message that prints on notices sent to borrowers that you identify in the Location and Borrower Type fields of this group.</td>
</tr>
<tr>
<td>Email Notice Language</td>
<td>If you have set up e-mail notification, enter the text to display in place of, or in addition to, the default e-mail message sent to borrowers that you identify in the Location and Borrower Type fields of this group. (For more information on e-mail notices, see “Setting Up E-mail Notification” on page S-160.)</td>
</tr>
</tbody>
</table>
### Setting Up Blocks

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Block</td>
<td>Enter or choose the code for the tax type you want to apply.</td>
</tr>
<tr>
<td>Tax Rate (eg. 0.75)</td>
<td>Enter the tax percentage rate as a decimal value, using this format: N.NN. (For example, “0.02” is the decimal equivalent of 2%, “0.10” is the decimal equivalent of 10%, and so forth.) When the fee or fine is assessed for a borrower, the tax is automatically calculated and added to the total amount due.</td>
</tr>
</tbody>
</table>

#### In this field Do this

- **Disallow Opac Renewals**: If you want to prohibit borrowers with this type of block from making renewals using your OPAC, mark this box.
- **Default Email Language**: Enter the text to display in an e-mail message sent to borrowers that you identify in the Location and Borrower Type fields of this group. You must specify in each borrower’s record whether they can receive notices by e-mail.
**Editing a Self-Serve Checkout Message Block**

Horizon uses system-generated message blocks for self-serve checkout. If a borrower comes to the circulation desk because they have received a message from the self-serve workstation, circulation staff can check the borrower’s record for the block that needs to be cleared.

You cannot delete predefined blocks, but you can create your own customized messages that override the system-generated messages.

These are the self-serve checkout system-generated messages:

<table>
<thead>
<tr>
<th>Message Code</th>
<th>Message Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDRESS_CORRECTION</td>
<td>Address Correction Requested - please refer to the circulation desk.</td>
</tr>
<tr>
<td>PHONE_CORRECTION</td>
<td>Phone Correction Requested - please refer to the circulation desk.</td>
</tr>
<tr>
<td>BAD_PASSWORD</td>
<td>Incorrect password.</td>
</tr>
<tr>
<td>BORROWER_ALIEN</td>
<td>Unknown barcode - please refer to the circulation desk.</td>
</tr>
<tr>
<td>BORROWER_BLOCKED</td>
<td>You are barred from borrowing - Please refer to the circulation desk.</td>
</tr>
<tr>
<td>BORROWER_INVALID</td>
<td>Please check out your items at the circulation desk.</td>
</tr>
<tr>
<td>CHECKIN_ALLOWED</td>
<td>Check in successful.</td>
</tr>
<tr>
<td>CHECKIN_FAILED</td>
<td>Checkin failed - please refer to the circulation desk.</td>
</tr>
</tbody>
</table>
Setting Up Blocks

To edit a self-serve checkout message block

1. Open the `selfcheck_message` view in the Table Editor.
2. Choose the message block that you want to change, or create a new message block.

<table>
<thead>
<tr>
<th>Message Code</th>
<th>Message Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHECKOUT_ALLOWED</td>
<td>Check out successful.</td>
</tr>
<tr>
<td>EXPIRED_BORROWER_CARD</td>
<td>Your card has expired - please refer to the circulation desk.</td>
</tr>
<tr>
<td>ITEM_ALIEN</td>
<td>Unknown barcode - please refer to the circulation desk.</td>
</tr>
<tr>
<td>ITEM_BLOCKED</td>
<td>This item is barred - please refer to the circulation desk.</td>
</tr>
<tr>
<td>ITEM_INVALID</td>
<td>Please refer this transaction to the circulation desk.</td>
</tr>
<tr>
<td>ITEM_ON_HOLD</td>
<td>This item is on hold - please refer to the circulation desk.</td>
</tr>
<tr>
<td>LOST_BORROWER_CARD</td>
<td>Lost card - please refer to the circulation desk.</td>
</tr>
<tr>
<td>MAX_LIMIT</td>
<td>Max Limit Reached - please refer any transactions to the circulation desk!</td>
</tr>
<tr>
<td>NO_CHECKIN_REQUESTS</td>
<td>This item is on request - please refer to the circulation desk.</td>
</tr>
<tr>
<td>RENEWAL_ALLOWED</td>
<td>Renewal successful.</td>
</tr>
<tr>
<td>RENEWAL_MAXRENEWAL</td>
<td>This item may not be renewed - please refer to the circulation desk.</td>
</tr>
<tr>
<td>YOUGOTIT</td>
<td>This item is already checked out to you.</td>
</tr>
<tr>
<td>REQUIRED_FEE_ITEM</td>
<td>Sorry: Processing fee is required for this item.</td>
</tr>
<tr>
<td>NEED_ATTENTION</td>
<td>This item needs library attention.</td>
</tr>
<tr>
<td>ITEM_NOT_OUT</td>
<td>Item not out - No checkin necessary.</td>
</tr>
<tr>
<td>NO_FEE_NEED_TO_PAY</td>
<td>You do not have any fee needed to pay.</td>
</tr>
<tr>
<td>PAYMENT_OVERAGE</td>
<td>The amount received exceeds the amount needed.</td>
</tr>
<tr>
<td>UNAPPROVED_BORROWER</td>
<td>You do not have approved status - please refer to the circulation desk.</td>
</tr>
<tr>
<td>ITEM_IN_TRANSIT</td>
<td>This item is in transit.</td>
</tr>
</tbody>
</table>
Horizon opens the Edit Selfcheck Message window:

![Edit Selfcheck Message window](image)

3 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter or choose the location code for the location whose self-serve checkout message you want to edit.</td>
</tr>
</tbody>
</table>
| Message Code      | Enter or choose the code for the message you want to edit.  
|                   | **IMPORTANT**  
|                   | If you click the Codes button, Horizon gives you an option to create a new code. However, a self-serve checkout program cannot use any new codes you create unless you purchase custom programming for the self-serve checkout program. (A self-serve checkout program can activate only Horizon’s hard-coded message codes.)  
| Message Text      | Enter the message text you want to display for this code on the borrower self-serve checkout monitor.  
|                   | Any text you enter replaces the default Horizon message.  |

4 Save your changes.
Displaying Blocks from Another Location

By default, each location displays blocks for only its own borrowers and for borrowers at any shared locations you have set up. (For more information on shared locations, see “Setting Up a Single Circulation Station for Multiple Locations” on page S-137.) You can specify in the block_item_location view for each location which other locations’ borrower blocks Horizon displays. (For example, if you want location 2 to show its own and location 3’s blocks, you can identify location 3 as a block location for location 2.)

You must individually set up each block location that you want to display at other locations. (For example, if you have three locations and you want location 1 to show all three location’s blocks, you can identify location 2 as a location whose blocks you want to display for location 1. Then you can identify location 3 as a location whose blocks you want to display for location 1.)

The Circ Settings By field in the matham view can also affect which locations’ blocks display. (For more information, see “System-Wide Settings” in the “General Setup” chapter of the System Administration Guide.)

This table explains the conditions under which blocks display for a location:

<table>
<thead>
<tr>
<th>Other location’s blocks display if this</th>
<th>and one of these</th>
</tr>
</thead>
<tbody>
<tr>
<td>You mark Item’s Location in the matham Circ Settings by field OR There is no checkout location listed on the item record</td>
<td>The item owning location is the same as the circulating location OR The circulating location is listed in the Location field and the item owning location is listed in the Block Loc’s field of the block_item_location view OR The item owning location is a shared location of the circulating location</td>
</tr>
<tr>
<td>You mark Circ’ing Location in the matham Circ Settings by field</td>
<td>The item checkout location is the same as the circulating location OR The circulating location is listed in the Location field and the item checkout location is listed in the Block Loc’s field of the block_item_location view OR The item checkout location is a shared location of the circulating location</td>
</tr>
</tbody>
</table>
To display blocks from another location

1. Open the `block_item_location` view in the Table Editor. Horizon displays the List Location’s Blocks window.

2. Choose the block location display you want to edit, or create a new block location. Horizon displays the Edit Location’s Blocks window:

3. Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter or choose the code for the location that you want to display other locations’ blocks.</td>
</tr>
<tr>
<td>Bloc Loc’s</td>
<td>Enter or choose the code for the location whose borrower blocks Horizon should display. You can enter only one location code in each window.</td>
</tr>
</tbody>
</table>

**NOTE**
If you want to remove a location’s capability to view another location’s borrower blocks, set the Location and Bloc Loc’s fields to the same location.

4. Save your changes.
If you want to display multiple other locations’ blocks at the same location, repeat steps 2 through 4.
Tracking a Cash Transaction

You can define a set of workstation parameters for each staff member so that you can identify who performed each transaction, and where. You can identify the workstation, the cash drawer, and the library department. (For more information, see “Setting Workstation Parameters to Track Payments” in the “Blocks” chapter of the Circulation Guide.)

Horizon tracks cash transactions that your staff records in Circulation (such as fine payments and refunds) and stores the information in the fee payment transaction log. You can view and print the information in the log using the Table Editor. You can also use a third-party report generator to extract information from the log and generate more structured reports.

Horizon tracks this kind of cash information:

- **Who performed the transaction.** This is determined by the workstation ID and staff user’s login. Horizon keeps track of the user ID of the person who handled the transaction only if they have authorization; otherwise, Horizon records the user ID of the staff member authorizing the transaction. (If a staff member who lacks authorization to conduct cash transactions, such as fine payments and refunds, attempts to perform such an action, Horizon requires permission from an authorized user before the transaction can be completed.)

  (For more information about setting up user IDs, see “Securing Horizon” in the “Security and Preferences” chapter of the System Administration Guide.)

- **What the transaction was.** (fine payment, refund, waiver, fee amount change). This is determined by the fee type block that the library staff member chooses when the transaction occurs. (For more information about fee block types, see “Setting Up Blocks” on page S-86.)

- **When the transaction occurred.** This is determined by the computer’s operating system date.

- **The workstation and location where the transaction took place.** This is determined by the workstation ID and location ID specified at the workstation. (For more information, see “Setting Workstation Parameters to Track Payments” in the “Blocks” chapter of the Circulation Guide.)

- **The cash drawer the cash was put into or taken from.** This is determined by the cash drawer ID specified at the workstation. (For more information, see “Setting Workstation Parameters to Track Payments” in the “Blocks” chapter of the Circulation Guide.)

**To track a cash transaction**

1. Open the `fee_payment_log` view in the Table Editor. Horizon displays the List Payment History window.
2. Use the **Display** button to choose the columns that you want to display in the list window.
You can choose from these columns:

- **Date.** The date the fee transaction occurred.
- **Dept.** The department where the transaction occurred.
- **Payment.** The payment type made (for example, credit adjustment, refund, or payment).
- **Fee.** The fee type block the transaction is for (for example, fine, fee, or lost).
- **Amount.** The monetary amount of the transaction (for example, the amount paid, refunded, waived, or adjusted).
- **Descr.** The description of the transaction.
- **Borr#.** The borrower number of the borrower for whom the transaction was made (taken from the borrower record).
- **Payment#.** The sequential order of the payment made at the workstation.
- **Location.** The location at which the transaction occurred.
- **Time.** The time the transaction was made.
- **DrawerID.** The cash drawer from which the transaction was made (determined by the Cash Drawer ID).
- **WkstID.** The workstation at which the transaction was made (determined by the workstation ID).
- **User.** The staff member who conducted the transaction (determined by logon ID).
- **Ck#.** The check number, if the transaction was paid by check and the staff member recorded the check number.
- **PayAmt.** The amount of the payment made.
- **Ref#.** A system-wide number that references the item transaction.
- **Ord.** This column is not used.
- **Incurred.** The date the fee type block was incurred.
Setting Renewal Rules

You may choose to let borrowers keep checked-out items for an additional loan period. When this happens, Horizon lets you renew the item instead of checking in the item and re-checking it out to the same borrower. Renewal rules let you determine the conditions under which borrowers may renew items. You can choose the length of a renewal period and whether that period is measured from the original due date or from the date of renewal. You can also choose the conditions under which you let borrowers renew items (for example, on requested or overdue items, or through your PAC).

This table shows due dates for several renewal situations:

<table>
<thead>
<tr>
<th>Loan unit</th>
<th>Default renewal loan period</th>
<th>Exception to renewal loan period</th>
<th>Renew From flag</th>
<th>Renewal date</th>
<th>Original due date</th>
<th>New due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>day</td>
<td>7</td>
<td>n/a</td>
<td>today’s date</td>
<td>3-12-02</td>
<td>n/a</td>
<td>3-19-02</td>
</tr>
<tr>
<td>day</td>
<td>14</td>
<td>n/a</td>
<td>original due date</td>
<td>3-12-02</td>
<td>3-10-02</td>
<td>3-24-02</td>
</tr>
<tr>
<td>day</td>
<td>14</td>
<td>21</td>
<td>today’s date</td>
<td>3-12-02</td>
<td>n/a</td>
<td>4-02-02</td>
</tr>
</tbody>
</table>

You must do tasks in several parts of Horizon in order to set up renewals correctly.

Before You Begin

Make sure you have set up these things:

- **Locations and location groups.** (For instructions, see “Library Locations” in the “General Setup” chapter of the **System Administration Guide**.)

  In the **location** view, specify whether you want to base overdue renewal due dates on the current date or the original due date.

  Horizon calculates the due date for renewed items by adding the renewal loan period to the date the renewal is made (“now”) or to the original due date and time. If you mark the **Always Renew From Now** box in the location view, Horizon always makes a renewal from the date of the renewal. If you do not mark the Always Renew From Now box, Horizon always makes renewals from the original due date.

  For example, if the Always Renew from Now box is marked, an item with a renewal loan period of seven days that was renewed on March 12 would have a new due date of March 19. If the Always Renew from Now box is not marked, an item originally due on March 14 and renewed on March 12 would have a new due date of March 21.

- **ITYPEs and ITYPE groups.** (For instructions, see “Preparing Horizon to Work with Item Records” on page S-6.)

- **BTYPEs and BTYPE groups.** (For instructions, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)

To set renewal rules

1. Define these circulation privileges and any exceptions for each location:
- **Renewal Period.** The length of time for which most borrowers may renew most items. If you do not want to allow renewals, enter “0” (zero).

- **Max. Renewals.** The maximum number of renewals, including phone renewals, that most borrowers can make for a single item.
  
  When a borrower who has reached this maximum attempts to check out or renew an item, Horizon blocks the procedure and displays a message about the maximum being reached. Circulation staff must resolve or override the block before the borrower can check out or renew items.

  This maximum can be any number up to 999. If you enter “0” (zero) in this field, Horizon ignores the maximum renewals field.

- **Max. Phone Renewals.** The maximum number of renewals that most borrowers can make by telephone for a single item.

- **Allow OPAC Renewals.** Whether borrowers can renew items from your PAC.

- **Max. OPAC Renewals.** The maximum number of renewals that borrowers can make from your PAC.

- **Allow Ovrd. OPAC Renewals.** Whether borrowers can renew overdue items from your PAC.

(For instructions on setting up circulation privileges, see “Setting Up Circulation Privileges and Parameters” on page S-51.)

2. If you want to let borrowers use Horizon Information Portal to make renewals on items that have hold requests on them, mark the **Renewal Allowed for Requested Items** field in the matham view.

   You may also need to do other setup tasks in Information Portal. (For instructions, see the *Information Portal System Administrator’s Guide*.)

3. If you want to keep borrowers with blocks from making renewals using your OPAC, use the **Disallow Opac Renewals** field in the block view to specify for each block your library uses whether the block prohibits renewals.

   (For instructions, see “Setting Up Blocks” on page S-86.)
Setting Up Hold Requests

You can let borrowers place requests for items that are not available for checkout (such as items in mending, checked out to another borrower, or on order). When one of these items become available, you place it on hold until the borrower who requested it can pick the item up. You can define rules in Horizon to help you handle hold requests. (For example, you can choose whether to require borrowers to place requests through a staff member, or to let them place their own requests from your PAC.) You can also choose how to notify borrowers that their requested items are ready to pick up.

You can choose to let your circulation staff fill a hold request with the first available item that is checked in at a specific pickup location, even if another copy is in transit. You can also choose whether Horizon displays a prompt suggesting that borrowers verify or update their personal information when circulation staff places a hold request for them.

When a requested item becomes available, Horizon keeps the item on the hold shelf for a time period you specify. If the borrower who made the request does not pick up the item before that period expires, Horizon cancels the hold. You can choose to include a location’s closed days in the hold shelf expiry period.

NOTE

Other types of requests (such as Closed Stack Access or interlibrary loan requests) may require different setup tasks. (For instructions, see the guide for the specific product.)

You need to set up several areas of Horizon to correctly regulate how Horizon manages hold requests.

This section gives an overview of those setup tasks. It also explains these topics:

- Setting Up the Request Privileges Parameter
- Working with Parameter 29 (Request Privileges)
- Setting Up Maximum Requests for BTYPEs and ITYPEs
- Setting Up Loan Overrides for Long Request Queues
- Understanding Transit Holds
- Populating the pickup_location_sort Table
- Choosing Pull List Sort Priority
- Setting Up the History of Requests
- Removing the Contact Information Prompt from the Hold Request Window
- Charging Fines for Expired Holds
Before You Begin

Make sure you have set up these things:

- **Locations and location groups.** (For instructions, see “Library Locations” in the “General Setup” chapter of the System Administration Guide.)
  
  In the location view for each location, do any or all of these options:
  
  - Mark one of the options in the Default Hold Notice Type field (mail, phone, or deliver) to determine how you will notify borrowers of holds.
  - If you want to let borrowers make their own requests when they search for an item in your PAC, mark the Allow PAC Hold Requests box.
  - Mark the Hold Shelf Expiry includes Closed days box if you want the hold shelf period to add an extra day to the hold expiration date for every closed day within the hold period. Clear the box if you want the expiration date to only use the hold period in the calculation.
  
  **Note:** Regardless of the selection for this box, the hold expiration date is always moved to the next closest open day of the library if the calculation happens to put the expiration date on a closed day.

- **ITYPEs and ITYPE groups.** (For instructions, see “Preparing Horizon to Work with Item Records” on page S-6.)

- **BTYPEs and BTYPE groups.** (For instructions, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.)
  
  In the btype view, enter information in the Request Period (days) field to determine how long a request remains in the queue before Horizon deletes the request.

  You may also want to define a maximum number of requests for the BTYPE.

To set up hold requests

1. Make appropriate item statuses available for request and available to fill requests.
   
   (For instructions, see “Defining or Editing an Item Status” on page S-13.)

2. Set up the Hold Shelf Period (Hold Period) circulation privilege and any exceptions to that default.
   
   The hold shelf period determines how long an item should remain on hold but not picked up before Horizon Day End cancels the hold. (For instructions, see “Setting Up or Editing a Circulation Privilege” on page S-55.)

3. Set up these circulation parameters and any exceptions:
   
   - **Request Privileges (parameter 29).** This specifies the locations that can request library items and the priority level of requests. (For instructions, see “Setting Up the Request Privileges Parameter” on page S-104.)
   
   - **Maximum requests for ITYPE (parameter 34).** This specifies the maximum number of pending requests an ITYPE can have at a time. (For instructions, see “Setting Up Maximum Requests for BTYPEs and ITYPEs” on page S-112.)
   
   - **Maximum hold requests (parameter 4).** This specifies the maximum number of pending requests a BTYPE can have at a time. (For instructions, see “Setting Up Maximum Requests for BTYPEs and ITYPEs” on page S-112.)
   
   - **Length of hold queue before loan period override applies (parameter 39).** This specifies the total number of requests that can be made for an item before Horizon applies a shorter loan period to each checkout of that item. (For instructions, see “Setting Up Loan Overrides for Long Request Queues” on page S-116.)
• **Loan period override for long request queues (parameter 40).** This specifies the loan period you want Horizon to assign when the number of requests for an item exceeds the limit you set. (For instructions, see “Setting Up Loan Overrides for Long Request Queues” on page S-116.)

4 If you want to notify borrowers when a request is deleted, mark the **Notify Borrower of Request Delete** box in the matham view.

5 If you want to fill an open hold request with the first available item that is checked in at the selected pickup location, enable the transit holds override. (For instructions, see “Enabling the Transit Holds Override” on page S-119.)

---

**Setting Up the Request Privileges Parameter**

The Request Privileges parameter (circulation parameter 29) determines how Horizon handles requests. You use this parameter to specify the locations that can request items from other locations and the order in which requests are filled. You prioritize requests by setting up exceptions.

This section explains these topics:

• Specifying Locations that Can Request Items
• Prioritizing Hold Requests

**Specifying Locations that Can Request Items**

You can specify which locations can make requests in Horizon. (A location can be a branch, department, or any other segment of your library that you define.)

**To specify locations that can request items**

1 Set up **request privileges** (circulation parameter 29).
   For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.

2 In the **Value** field, do one of these options:
   • If you do not want to allow requests, enter “0” (zero).
   • If you want to allow requests but do not want to prioritize them, enter “1”.
   • If you want to prioritize requests, enter a number between 0 and 255 to specify the default priority level.
     Horizon gives this priority to all hold requests for which there is not an overriding exception. (For more information, see “Prioritizing Hold Requests” on page S-105.)

3 Save your changes.
Prioritizing Hold Requests

NOTE
Read this entire section before you try to set priorities.

You can prioritize the order in which Horizon fills hold requests using anywhere from 1 to 256 levels.

You can prioritize hold requests if you want to give borrowers in one group access to items on hold before borrowers in another group get access to those items. (For example, if you are a university library, you can prioritize hold requests so that faculty members advance on the holds queue list before students. Likewise, you can let students advance on the holds queue list before interlibrary loan requests or community borrowers.)

You prioritize hold requests by setting up exceptions to the default. All borrowers have equal rights for their request to enter the hold queue at the time the request is made, unless an exception exists that overrides the default.

For example, in a three-library consortium consisting of libraries A, B, and C, the system administrator of library A establishes a hold priority default of 1. Then the system administrator of library A sets up a hold request exception of 2 for library C. This would let borrowers from libraries A and B with requests on a hold list have their hold requests filled before borrowers from library C, even if library C borrowers have been on the waiting list for a longer time.

Here is a graphic example:

In this situation, students and faculty from the university advance on the holds list before borrowers from the two community colleges and the public library, even if these latter borrowers have been on the hold list for a longer time. Also, borrowers from the two community colleges will advance on a holds list before borrowers from the public library, again regardless of the how long...
the public library borrowers have been on the holds list. This means that borrowers from the public library have access to items on the holds list only when there are no borrowers from the university or the two community colleges on the list.

NOTE

This example gives the perspective of the university library’s holds policies. The community colleges and the public library can set up their own priority levels for the items that they own.

You can set up groups of locations, BTYPES, or ITYPES and prioritize the groups so that Horizon identifies hold requests that are for pickup at the item’s home location first. Then Horizon can identify a priority within the cluster, and finally apply a priority between clusters. This is called a “cluster hold.” You set up a cluster hold by defining sets of Item Location Groups and Circulation Location Groups in a single Special Value.

Using the same example, the University Library would set up these special values:

<table>
<thead>
<tr>
<th>Enter this in the Borrower Location Group</th>
<th>Enter this in the Value field</th>
<th>Enter this in the Item Location Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Library</td>
<td>1</td>
<td>University Library</td>
</tr>
<tr>
<td>Community College A</td>
<td>2</td>
<td>University Library</td>
</tr>
<tr>
<td>Community College B</td>
<td>2</td>
<td>University Library</td>
</tr>
<tr>
<td>Public Library</td>
<td>3</td>
<td>University Library</td>
</tr>
</tbody>
</table>

You can grant hold request priorities based on library location (including the owning location, the location where the request was placed, the location where the requester wants to pick up the item, or the requester’s home location), BTYPE, ITYPE, or combinations of these options. (For example, the staff and professors at a university could have a different priority than students. Students could have different priorities depending on whether they were online students or on campus.)

Before You Begin

Consider these things:

- Borrowers with a priority level of zero are never placed on a holds list. If you set your default at zero, none of your default groups will ever show up on a holds list, making it easier to isolate specific exceptions for testing purposes.
- You can set up groups of locations, BTYPES, or ITYPES and prioritize the groups so that Horizon identifies hold requests that are for pickup at the item’s home location first. Then Horizon can identify a priority within the group (or cluster), and finally apply a priority between clusters. This is called a “cluster hold.” (For more information on creating groups, see “Creating or Editing Groups to Define Circulation Privileges and Parameters” on page S-52. For examples of setting up priorities, see “Working with Parameter 29 (Request Privileges)” on page S-108.)
You may want to map out your entire library community and the priority levels that you want to grant each section before you start. This will help you determine where to set your default and exceptions.

NOTE

You can set your local default at a lower priority than the priority level of another borrower community using your library. However, this lets borrowers from the other community have access to items in your library first. (Lower priorities are indicated by higher values. “5” is a lower priority than “3.”)

To prioritize hold requests

1 Set up Request privileges (circulation parameter 29).
   For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.

2 In the Value field, enter any number from 0 to 255 to use as the default priority level. Horizon gives this priority to all hold requests for which there is not an overriding exception. Entering “0” (zero) disables access to the hold list for the location, BTYPE, or ITYPE group you are setting up.

   If you want to give some of your exceptions a higher priority than the default, while others have a lower priority, you should set the default value at an intermediate level, such as 50. Then you can grant some borrowers a higher priority (that is, less than 50) and others a lower priority (that is, greater than 50).

3 Do these steps in the Special Values group to set up an exception that prioritizes hold requests:

   1 Choose the exception that you want to change, or create a new exception.
   2 Enter or choose a code in one or more of the location, borrower type, or item type fields.
   3 In the Value field, enter a number between 0 and 255 for the priority level.
      If you want to disable access to hold lists for this location or type, enter “0” (zero).

   NOTE

   The exception value set here overrides the default value for this parameter.
   You have a great deal of flexibility when you create an exception. (For example, you can simply enter or choose a code in the Borrower Location Group field and apply this exception to borrowers registered at a given location, or you can use the borrower location group in combination with a specific ITYPE group.)

4 Save your changes.

5 Repeat steps 3 and 4 until you have set up all the exceptions you want to use to prioritize your hold requests.
Working with Parameter 29 (Request Privileges)

**IMPORTANT**

Although examples in this section deal with hold requests, the same general concepts of grouping apply to setting up all circulation parameters and privileges.

Some sites have a large number of locations, with groups of locations that are related in some way. This relationship may be geographic. (For example, a library system might have branches in several cities, with multiple locations in each city. The library system might allow filling holds for locations within the same city [the same branch], but not between branches in different cities.)

The relationship may be by library type. (For example, in a consortium of both academic and public libraries, the academic libraries may have related requirements while the public libraries have a different set of related requirements.) You can set up locations, ITYPEs, and BTYPES, and group them if they have related requirements. This lets you make fewer exceptions for each parameter.

This section gives several examples of how Horizon handles various parameter 29 settings. It also explains these topics:

- Understanding Circulation Privilege Implications for Location Groups
- Understanding Circulation Privilege Implications for BTYPE and ITYPE Groups

**Circulation Parameter 29 Examples**

Suppose you are a three-city consortium with three branch libraries in each city, and that you allow requests between libraries in the same city, but not between cities. Suppose the cities are C1, C2, and C3, and the branches in each city are B1, B2, and B3. When you set up the individual locations (such as C1B1, C1B2, C1B3, C2B1, C2B2, and so on), Horizon automatically creates a group for each location containing only that location.

Suppose you also set up the location groups to contain all the individual locations:

<table>
<thead>
<tr>
<th>This location group</th>
<th>Contains these libraries</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1 (City 1)</td>
<td>C1B1, C1B2, and C1B3</td>
</tr>
<tr>
<td>C2 (City 2)</td>
<td>C2B1, C2B2, and C2B3</td>
</tr>
<tr>
<td>C2 (City 2)</td>
<td>C3B1, C3B2, and C3B3</td>
</tr>
</tbody>
</table>

**Example 1**

To let the correct groups loan items to each other, you could set up the request privileges parameter (parameter 29) with a default value of 0 (zero) and exceptions like this (a value indicates the request priority, with 1 being the highest):

<table>
<thead>
<tr>
<th>Exception</th>
<th>Circulation (Pickup) Location Group</th>
<th>Item Location Group</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>C1</td>
<td>C1</td>
<td>1</td>
</tr>
</tbody>
</table>
Suppose a borrower places a request on an item at location C2B1 (City 2, Branch 1), and the borrower wants to pick it up at location C2B3 (City 2, Branch 3). Horizon examines each of the three exceptions, looking for Item Location Groups that contain the location C2B1. It finds only one—the location group C2. Next Horizon looks at the pickup location, and finds it in the Circulation Location Group C2 which is part of the same exception as the Item Location Group being considered. Since you have set the value as 1, Horizon places the request.

Now, suppose a borrower places a request for an item owned by C2B1 and wants to pick it up at location C1B1. Horizon finds Item Location C2B1 in Item Location Group C2 (exception 2), and then looks to see if the pickup location C1B1 is in the Circulation Location Group for exception 2 (C2). Since the pickup location is not in that group, there is no match and Horizon does not fill the request.

**Example 2**

Suppose that, in your consortium, the request for an item at its owning library has a higher priority than a request for an item at another library within the same group. You could set up the request privileges parameter (parameter 29) with a default value of 0 (zero) and exceptions like this:

<table>
<thead>
<tr>
<th>Exception</th>
<th>Circulation (Pickup) Location Group</th>
<th>Item Location Group</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>C1</td>
<td>C1</td>
<td>10</td>
</tr>
<tr>
<td>2</td>
<td>C2</td>
<td>C2</td>
<td>10</td>
</tr>
<tr>
<td>3</td>
<td>C3</td>
<td>C3</td>
<td>10</td>
</tr>
<tr>
<td>4</td>
<td>C1B1</td>
<td>C1B1</td>
<td>1</td>
</tr>
<tr>
<td>5</td>
<td>C1B2</td>
<td>C1B2</td>
<td>1</td>
</tr>
<tr>
<td>6</td>
<td>C1B3</td>
<td>C1B3</td>
<td>1</td>
</tr>
<tr>
<td>7</td>
<td>C2B1</td>
<td>C2B1</td>
<td>1</td>
</tr>
<tr>
<td>8</td>
<td>C2B2</td>
<td>C2B2</td>
<td>1</td>
</tr>
<tr>
<td>9</td>
<td>C2B3</td>
<td>C2B3</td>
<td>1</td>
</tr>
<tr>
<td>10</td>
<td>C3B1</td>
<td>C3B1</td>
<td>1</td>
</tr>
<tr>
<td>11</td>
<td>C3B2</td>
<td>C3B2</td>
<td>1</td>
</tr>
<tr>
<td>12</td>
<td>C3B3</td>
<td>C3B3</td>
<td>1</td>
</tr>
</tbody>
</table>

Suppose a borrower places a request on an item owned by C1B1 and wants to pick up the item at that same location. The table shows two exceptions that satisfy that criteria: numbers 1 and 4. C1B1 is a location in the Location Group C1 as well as in the Location Group C1B1, and so both exceptions are candidates.
Whenever someone places a request, Horizon must first identify which possible exceptions it can use. In this example, Horizon can use exceptions 1 and 4. Next Horizon looks at how many locations are defined within the location groups for each row, and uses the one that has the fewest locations. In this case, this means that, although Location C1B1 is in both Location Group C1 and Location Group C1B1, since location group C1 has three defined locations and C1B1 has only one, Horizon uses the C1B1 location group. Horizon uses this identification process for each applicable group (in this example, Item Location Group and Circulation Location Group), and as long as there is an exception where for each group the count is less than the others, Horizon chooses that exception. In this example, since exception 4 has the lowest count for both of the matches, Horizon returns a value of 1—the highest possible fill priority.

If a borrower places a request on an item owned by C1B1 and wants to pick up the item at C1B2, only row 1 matches. The value of 10 means that the request has a lower fill priority (value 1 is highest).

If a borrower places a request on an item owned by C1B1 and wants to pick up the item at C2B1, then no rows match, and the request is not allowed.

**NOTE**

If there are two rows where for one group the count is higher than the other, and for another group the count is lower than the other, Horizon notifies you that an error has occurred. You need to check your setup.
Example 3

Suppose that from city C1, borrowers can request items from any other location, but for cities C2 and C3, borrowers from each city can request items only from their own library. However, requests across cities (from C1 to either C2 or C3) have the lowest priority. You could set up the request privileges parameter (parameter 29) with a default value of 0 (zero) and exceptions like this:

<table>
<thead>
<tr>
<th>Exception</th>
<th>Circulation (Pickup) Location Group</th>
<th>Item Location Group</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>C1</td>
<td>C1</td>
<td>10</td>
</tr>
<tr>
<td>2</td>
<td>C2</td>
<td>C2</td>
<td>10</td>
</tr>
<tr>
<td>3</td>
<td>C3</td>
<td>C3</td>
<td>10</td>
</tr>
<tr>
<td>4</td>
<td>C1B1</td>
<td>C1B1</td>
<td>1</td>
</tr>
<tr>
<td>5</td>
<td>C1B2</td>
<td>C1B2</td>
<td>1</td>
</tr>
<tr>
<td>6</td>
<td>C1B3</td>
<td>C1B3</td>
<td>1</td>
</tr>
<tr>
<td>7</td>
<td>C2B1</td>
<td>C2B1</td>
<td>1</td>
</tr>
<tr>
<td>8</td>
<td>C2B2</td>
<td>C2B2</td>
<td>1</td>
</tr>
<tr>
<td>9</td>
<td>C2B3</td>
<td>C2B3</td>
<td>1</td>
</tr>
<tr>
<td>10</td>
<td>C3B1</td>
<td>C3B1</td>
<td>1</td>
</tr>
<tr>
<td>11</td>
<td>C3B2</td>
<td>C3B2</td>
<td>1</td>
</tr>
<tr>
<td>12</td>
<td>C3B3</td>
<td>C3B3</td>
<td>1</td>
</tr>
<tr>
<td>13</td>
<td>C1</td>
<td></td>
<td>255</td>
</tr>
</tbody>
</table>

The setup is the same as in the previous example, except for this added row. 255 is the lowest priority possible.

Suppose a borrower requests an item owned by C2B1 and wants to pick it up at C1B1. As Horizon looks at each exception, only number thirteen matches on the Item Location Group (Location C1B1 is in Location Group C1). Since the Circulation Location Group is empty, any circulation location will match. Horizon makes the request, but with a low priority level.

Now suppose a borrower places a request on an item owned by C1B1 and wants to pick it up at that same location. Horizon first identifies exceptions 1, 4, and 13 as candidates. Since exceptions 1 and 4 each have two matches but exception 13 has only one, Horizon ignores exception 13. Horizon checks again to find the exception with the lowest count for the various matches, and identifies number 4 because each of its location groups has only one location (in exception 1, each location group has three locations).
Understanding Circulation Privilege Implications for Location Groups

If you have multiple locations with the same requirements for their circulation privileges, you can create a Location Group containing those locations. Then you need to set up only one set of circulation privileges for that Location Group that applies to all the locations in that group.

If you have an existing set of circulation privileges and you add a new location that shares those privileges, you can add the new location to any group that already uses those privileges.

**IMPORTANT**

Every circulation privilege must include each location only once in a location group. Horizon delivers an error message if you have the same location assigned multiple times to the same circulation privilege.

Understanding Circulation Privilege Implications for BTYPE and ITYPE Groups

If you have multiple BTYPEs or ITYPEs with the same requirements for their circulation privileges, you can create a BTYPE or ITYPE group containing those BTYPEs or ITYPEs. Then you need to set up only one circulation privilege for the group that applies to all the BTYPEs or ITYPEs in that group.

If you have an existing set of circulation privileges and you add a new BTYPE or ITYPE that shares those privileges, you can add the new BTYPE or ITYPE to any group that already uses those privileges.

Setting Up Maximum Requests for BTYPEs and ITYPEs

Once you have set up locations to allow requests (for instructions, see “Specifying Locations that Can Request Items” on page S-104), you can set the number of requests that each BTYPE group can make. You can also set the number of requests allowed for different ITYPE groups.

When a request is made, Horizon follows this workflow in granting the request:

1. Horizon checks the default and exception settings in request privileges.
2. If the default value is “1” (requests allowed), Horizon checks max. hold requests to verify that these conditions exist:
   - The default value is “1” (requests allowed for BTYPEs).
   - The maximums set in the exceptions have not been exceeded.
3. If requests are allowed for the BTYPE and maximums have not been exceeded, Horizon checks max. requests for ITYPE to verify that these conditions exist:
   - The default value is “1” (requests allowed for ITYPEs).
   - The maximums set in the exceptions have not been exceeded.
If requests are allowed and neither the BTYPE nor ITYPE maximums have been exceeded, Horizon grants the request.

For example, suppose your library is set up with these request parameters for default BTYPEs and ITYPEs, and these exceptions for a Student BTYPE and the book and audio ITYPEs:

<table>
<thead>
<tr>
<th>Borrower and Item Types</th>
<th>Default Value (Requests)</th>
<th>Exception Value (Requests)</th>
<th>Quantity of Requested Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>BTYPE</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student</td>
<td></td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>ITYPE</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Books</td>
<td></td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Audio</td>
<td></td>
<td>5</td>
<td>3</td>
</tr>
</tbody>
</table>

A student has requested two books and three audio items. When she tries to request a fourth audio item, the request is declined because allowing it would exceed the maximum number of requests for the BTYPE exception (5).

In this example, the BTYPE “student” can request a maximum of five items of any combination of ITYPEs. According to the individual ITYPE maximums, the student may request three more books and two more audio items. Even though the ITYPE limits have not been exceeded, the BTYPE limit has been exceeded. In this example, the BTYPE limit takes precedence over the ITYPE limits.

Here is another example. Assume these request parameters:

<table>
<thead>
<tr>
<th>Borrower and Item Types</th>
<th>Default Value (Requests)</th>
<th>Exception Value (Requests)</th>
<th>Quantity of Requested Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>BTYPE</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student</td>
<td></td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>ITYPE</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Books</td>
<td></td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Audio</td>
<td></td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

A student has requested two books and two audio items. When he attempts to request a book, the request is denied because doing so would exceed the maximum number of requests for the ITYPEs.

In this example, the BTYPE “student” can request a maximum of ten items of any combination of ITYPEs. According to the BTYPE limit, the student may request six more items than he has already requested; however, the ITYPE limits for books and audio have already been met. In this example, the ITYPE limits take precedence over the BTYPE limits.

Keep this workflow in mind as you set up the maximum number of requests for both ITYPEs and BTYPEs.

This section explains these topics:

- Setting Up the Maximum Number of Requests for an ITYPE
- Setting Up the Maximum Number of Requests for a BTYPE
Setting Up the Maximum Number of Requests for an ITYPE

You can specify the maximum number of requests that you want to allow for each ITYPE. This can help you keep hold request lists at a more manageable length.

**IMPORTANT**

If you set the default value in circulation parameter 29 (request privileges) to “0” (zero) (no requests allowed), settings made in this circulation parameter have no effect.

To set up the maximum number of requests for an ITYPE

1. Set up **max requests for itype** (circulation parameter 34).
   For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.
2. In the **Value** field, do one of these options:
   - If you want to allow requests, enter the default maximum number of hold requests you want to allow for any ITYPE.
   - If you want to keep borrowers from making requests, enter “0” (zero).
3. If you want to create or edit any exceptions, do these steps in the **Special Values** group:
   1. Choose the exception that you want to change, or create a new exception.
   2. Enter or choose a code in one or more of the location, borrower type, or item type fields.
   3. In the **Value** field, enter a numerical value for the maximum number of requests that may be made for the specified ITYPE group.

   **NOTE**

   The exception value set here overrides the default value for this parameter.

4. Save your changes.
Setting Up the Maximum Number of Requests for a BTYPE

You can specify the maximum number of requests each BTYPE. This can help you keep individuals from having unmanageable hold request lists.

**IMPORTANT**

If you set the default value in circulation parameter 29 (request privileges) to “0” (zero) (no requests allowed), settings made in this circulation parameter have no effect.

### To set up the maximum number of requests for a BTYPE

1. Set up max. hold requests (circulation parameter 4).
   - For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.

2. In the Value field, do one of these options:
   - If you want to allow requests, enter the default maximum number of hold requests you want to allow for any BTYPE.
   - If you want to keep borrowers of this type from making any requests, enter “0” (zero).

**IMPORTANT**

If the default value set in circulation parameter 29 (request privileges) is “0” (zero) (no requests allowed), settings made in circulation parameter 34 (max. requests for ITYPE) have no effect.

3. If you want to create or edit any exceptions, do these steps in the Special Values group:
   1. Choose the exception that you want to change, or create a new exception.
   2. Enter or choose a code in one or more of the borrower location or BTYPE fields.
   3. In the Value field, enter a numerical value for the maximum number of requests that may be made for the specified BTYPE group.

**NOTE**

The exception value set here overrides the default value for this parameter.

4. Save your changes.
Setting Up Hold Requests

Setting Up Loan Overrides for Long Request Queues

When an item in your library has a large number of hold requests, you can have Horizon shorten the item’s loan period so that the item can circulate more frequently. This gives more borrowers the opportunity to check out your more popular items.

Horizon lets you specify the total number of unfilled requests that can be in an item’s request queue before the loan period override takes effect. It also lets you specify the length of the shortened loan period. Both of these settings are required to use the loan period override feature.

For example, suppose you set the request queue length at 30 and the loan period override at 7 days. A requested item has a default loan period of 14 days. When the total number of requests in the request queue exceeds 30 and a borrower checks out a requested item, Horizon uses the loan period override and checks out the item to the borrower for the override loan period of 7 days instead of the default. Horizon also notifies the staff during checkout that the loan period has been shortened so that the staff member can inform the borrower.

You can define exceptions for loan period override parameters by setting values for ITYPE groups, BTYPE groups, and location groups, or combinations of the three.

This section explains these topics:

- Setting the Length of the Request Queue
- Setting the Loan Period Override

Setting the Length of the Request Queue

Circulation parameter 39 (Length of hold queue before loan period override applies) lets you specify the number of unfilled requests that can be in the request queue before Horizon applies the loan period override.

To set the length of the request queue

1. Set up **length of hold queue before loan period override applies** (circulation parameter 39).
   
   For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.

2. In the **Value** field, enter the total number of unfilled requests that can be in the request queue before Horizon applies the loan period override.
   
   If you enter “0” (zero), Horizon never applies the loan period override.
3 If you want to create or edit any exceptions, do these steps in the **Special Values** group:

1. Choose the exception that you want to change, or create a new exception.
2. Enter or choose a code in one or more of the location group, borrower type group, or item type group fields.
3. In the **Value** field, do one of these options:
   - If you do not want to use the loan period override, enter “0” (zero).
   - Enter the total number of unfilled requests that can be in the queue before Horizon applies the loan period override.

**NOTE**

The exception value set here overrides the default value for this parameter.

4 Save your changes.

### Setting the Loan Period Override

The loan period override is the loan period Horizon uses instead of the normal loan period when the limit of unfilled requests in the queue (set in circulation parameter 39) is exceeded. (For more information, see “Setting the Length of the Request Queue” on page S-116.)

**To set the loan period override**

1. Set up **Loan period override for long request queues** (circulation parameter 40).
   For general instructions, see “Setting Up or Editing a Circulation Parameter” on page S-59. Then use the remaining steps of this task to customize the parameter.

2. In the **Value** field, enter the default number of days for the loan period override.
   (For example, if you want the loan period override to be one week, enter “7”.)

3. Mark the appropriate unit of time that works with the number you entered in the Value field (days, hours, or minutes).

   If the loan period override is set to a value greater than the default loan period, Horizon uses the default loan period. (For example, if the default loan period is set to 14 and you set a loan period override of 21, Horizon uses the shorter 14-day loan period.)

4. If you want to create or edit any exceptions, do these steps in the **Special Values** group:

   1. Choose the exception that you want to change, or create a new exception.
   2. Enter or choose a code in one or more of the location, borrower type, or item type fields.
   3. In the **Value** field, enter a numerical value for the loan period override exception you want to use.
   4. Mark the appropriate unit of time that works with the number you entered in the Value field.

**NOTE**

The exception value set here overrides the default value for this parameter.
Setting Up Hold Requests

5 Save your changes.

Understanding Transit Holds

When a location checks in an item that has been requested at another location, Horizon changes the item’s status to “In Transit” and tells the staff member where to send the item. This item is then called a “transit hold.” By default, Horizon requires you to use this transit hold to fill the next hold request in the hold request queue, whether that request is local or remote. You can change this default and instead let your circulation staff fill a local open hold request with the first available item that is checked in at your location. You can also set up Horizon so that it tries to minimize the number of transit holds.

NOTE

Your library may occasionally use short non-standard item barcodes (those that are shorter than your system administrator has defined in the location view). If you modify and save any item barcodes on in-transit items, Horizon automatically pads or adds digits to equal the defined barcode length. When the items get to the new location, users or staff cannot search for them because the barcodes are invalid.

If you do not modify and save a barcode as you work with in-transit items, Horizon leaves short, non-standard barcodes as they are.

This section explains these topics:

- Enabling the Transit Holds Override
- Minimizing Transit Holds
Enabling the Transit Holds Override

You can set Horizon to let your circulation staff fill a local open hold request with the first available item that is checked in at your location, even if another copy is in transit from another location in response to that particular hold request. This can sometimes help your local users have faster access to the items that they have put on hold. When the in-transit item (transit hold) arrives, it can be used to fill the next open hold request at your location (if one exists) or it can be returned immediately to the originating library.

To enable the transit holds override

1. Open the location view in the Table Editor.
   Horizon displays the List Location Parameters window.
2. Choose the location where you want to enable transit hold overrides.
3. Click Edit.
   Horizon displays the Edit Location Parameters window.
4. Display the Allow Transit Holds Override option:

   Mark this box to let circulation staff override transit holds.

5. Mark the Allow Transit Holds Override box.
6. Save your changes.
Minimizing Transit Holds

You can set up Horizon so that it tries to minimize the number of transit holds. The Request Pull List window displays the message “Using Location Priority” in the header when you turn on this feature.

When a borrower requests an item at your location and the item becomes available, Horizon adds the request to the Request Pull List. This report lists items that staff should gather to fill borrower hold requests. When multiple borrowers request the same available item, by default Horizon chooses which request to fill by sorting first on any priority order you define. (For instructions, see “Prioritizing Hold Requests” on page S-105.) If several requests for the same item have the same priority, Horizon chooses the oldest request (the request made first). The Request Pull List displays the item and the borrower to whom the requested item should go.

After you set Horizon to try to minimize transit holds, Horizon matches borrower requests to the owned items of the borrower’s chosen pickup location before considering sending an item to another location. Then Horizon sorts requests by the defined priority order, and finally by the order in which borrowers made the requests.

To minimize transit holds

1. Open the matham view in the Table Editor.
2. Display these fields:

   ![System-wide Parameters](image)

   - Mark the **Pull List Uses Location Priority** field.
3. Save your changes.
Populating the pickup_location_sort Table

You must populate the pickup_location_sort table with each of your locations in order to make requests work properly. That way, all locations will display when you make requests. You populate the table using the Pickup Loc Sort process.

**To populate the pickup_location_sort table**

1. Start the **Pickup Loc Sort** process.
   - The default location of this process is the Circulation/Circulation Control Menu folder on the navigation bar.
   - Horizon displays the Pickup Loc Sort window:

   ![Pickup Loc Sort Window](image)

   - Location
     - Main
   - Pickup locations
     - [Locations]
       - [Check boxes]

2. Highlight each location listed in the **Location** drop-down list.

   **WARNING**

   *You must* highlight each library location in the drop-down list or requests will not work.

3. Close the **Pickup Loc Sort** window.
Choosing Pull List Sort Priority

You can define which type of information displays first on your pull lists. You can choose whether you want to sort the list by location, Circ 29, or the request queue order.

**To choose the pull list sort priority**

1. Open the matham view.
2. In the **Pull List Priority** field, choose one of these options:
   - None
   - Location Priority
   - Circ 29
   - Request Queue Order
3. Save your changes.

**NOTE**
The Matham table controls system-wide settings for Horizon. The choice you make here will affect all Pull List Sort Priority across the entire library system.

Setting Up the History of Requests

If you want to track and create reports on how long it takes your library to fill a request, you can choose to keep a history of requests.

This section explains these topics:

- Choosing to Keep a History of Requests
- Setting Up the DeDelRH Day End Process for Request History

Choosing to Keep a History of Requests

If you want to track and create reports on how long it takes your library to fill a request, you can choose to keep a history of requests. You can also specify how long you want Horizon to keep track of requests.

You can view request history in either a Web Reporter report or in the request_history table via the Table Editor.

**To keep a history of requests**

1. Open the matham view.
2. In the **Request History Duration (days)** field, enter the number of days that Horizon should track requests in one report.
3. Save your changes.
Setting Up the DeDelRH Day End Process for Request History

The Day End process “Delete Request History” (DeDelRH) deletes the requests that Horizon has been tracking. This process deletes the requests after the amount of days that you specify to keep them in the matham view.

**NOTE**

The Horizon 7.4 upgrade delivers the DeDelRH Day End process as an inactive process. If you want to run it with your Day End suite, you need to add it as an option to the MDayEnd menu. In addition, the process is automatically configured to run daily. Because this process accesses the item table, it may take longer to run Day End with this process added to the suite. If you want, you can set this process to run weekly, rather than daily, by changing the process argument from “/d” to “/w” (number of the day of the week.) (For example, enter “/w5” to run the process on the fifth day of the week.) The number “0” represents Sunday.

---

Removing the Contact Information Prompt from the Hold Request Window

When circulation staff places a hold request for a borrower, Horizon displays a prompt suggesting that the borrower verify or update the information that the library has on file for the borrower (such as the borrower’s address, telephone number, and notification method). Keeping this contact information current can help your library deliver hold notifications and other library communications to the borrower.

However, if you do not want the Hold Request window in Circulation to display this message, you can remove it.

**To remove the contact information prompt from the Hold Request window**

1. Open the **mq_view** view in the Table Editor, or start the **View Control** process.
   - The default location of this process is the **Administration\System Setup** folder on the navigation bar.
   - Horizon opens the List Search window.
2. Enter “request” in the **Search for** field.
   - Horizon opens a List Horizon View window.
3. Double-click **request**.
   - Horizon opens an Edit Horizon View window.
Setting Up Advanced Booking

4  Display the Edit View group:

5  From the Column Name drop-down list, choose notify_info.

6  Click Delete.

7  Save your changes.

Setting Up Advanced Booking

Advanced Booking lets borrowers reserve restricted access materials for a specific date and time. On the date of the reservation, the borrower can check out the material for a library-defined loan period.

Your library users can use Information Portal to book library material in advance if you have this set up in both Horizon and in Information Portal. (For more information, see “Changing Your Library’s Horizon Connection Settings” in the “Changing the Setup” chapter of the Information Portal System Administrator’s Guide.)

This section explains these topics:

- Understanding Advanced Booking Concepts
- Setting Up Advanced Booking
Understanding Advanced Booking Concepts

Here are some Advanced Booking concepts with which you may want to be familiar:

- Bookable Items
- Booking Period
- Loan Periods
- Due Dates
- Conflicts

Bookable Items

Horizon lets users book only those items that have a bookable item type (ITYPE). Your library may have several items of various types (for example, book and video tape), attached to the same bib record. For those items that are bookable, you can specify different booking periods.

Users can make bookings at either the bibliographic or the item level. If a borrower attempts to book a title with multiple bookable ITYPEs at the bibliographic level, Information Portal displays a message saying that the borrower must book a specific item.

Booking Period

Borrowers can make bookings in Information Portal if you have this set up. The booking period is the block of time that a borrower schedules to use library materials. The Booking bar represents the time that is available for booking the item:

<table>
<thead>
<tr>
<th>Book Item for 01/31/2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the start time and end time of your booking and click the button: Book Item</td>
</tr>
<tr>
<td>King Arthur and the Round Table /</td>
</tr>
<tr>
<td>Talbott, Harrison.</td>
</tr>
<tr>
<td>898.2084202 Tal</td>
</tr>
<tr>
<td>01/31/2004</td>
</tr>
</tbody>
</table>

In addition to the start and end times that the user chooses, there are two other booking period components that the library controls:

- **Booking Increments.** The intervals in minutes or hours available to choose from the start and ending time drop-down lists. (For example, an increment may be 30 minutes, in which case the start and end times in the drop-down lists are at 30-minute intervals: 2:00, 2:30, 3:00, and so forth.)
• **Maximum Booking.** The number of days or length of time in advance that borrowers can make bookings. This lets you control the number of days that Information Portal displays on the advanced booking calendar:

<table>
<thead>
<tr>
<th>Date</th>
<th>Booking Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/03/2004</td>
<td></td>
</tr>
<tr>
<td>03/04/2004</td>
<td></td>
</tr>
<tr>
<td>03/05/2004</td>
<td></td>
</tr>
<tr>
<td>03/06/2004</td>
<td></td>
</tr>
<tr>
<td>03/07/2004</td>
<td></td>
</tr>
<tr>
<td>03/08/2004</td>
<td></td>
</tr>
<tr>
<td>03/09/2004</td>
<td></td>
</tr>
<tr>
<td>03/10/2004</td>
<td></td>
</tr>
<tr>
<td>03/11/2004</td>
<td></td>
</tr>
<tr>
<td>03/12/2004</td>
<td></td>
</tr>
</tbody>
</table>

This example shows a maximum booking of ten days in advance.

### Loan Periods

The length of time for which a bookable item can be checked out.

You define the loan period for bookable items in the same way that you define regular loan periods, or by defining exceptions to the standard loan period. The combination of the item’s owning location and ITYPE plus the booker’s BTYPE determine how long a booked item can be checked out.

### Due Dates

The due date and time for a booked item is determined by the loan period. However, if a previous booking overlaps the loan period, Horizon may shorten the loan period.
For example, if the loan period is two hours and an item is checked out at 2:00 p.m., the due time is 4:00 p.m. However, if the next booking for the item is 3:30 p.m., then the due time of the earlier booking is 3:30 p.m.

**NOTE**

If the chosen booking period extends beyond the library’s closing time, and the ITYPE allows keeping the material overnight, Horizon prompts borrowers to specify whether they want to keep the material overnight. If they choose to do so, the due date becomes the next time the library location opens, which may be over a weekend (or longer because of closed days).

**Conflicts**

You may have booking and checkout conflicts when someone other than the booker attempts to check out a copy of a booked-up title.

If an item is booked and another user wants to check out the item, Horizon warns staff that the item is booked. The staff member then needs to choose to override the warning.

**Setting Up Advanced Booking**

To use Advanced Booking in Information Portal, you must set it up in both Horizon and Information Portal. You do this by completing several tasks in Horizon and making a setting in Information Portal. (For instructions on making the setting in Information Portal, see “Changing Your Library’s Horizon Connection Settings” in the “Changing the Setup” chapter of the *Information Portal System Administrator’s Guide.* You should do the tasks in the order in which they are explained in this section.

**NOTE**

You may already have set up Advanced Booking in Horizon, but you may want to check the tasks in this section to be sure that your settings will work with Advanced Booking in Information Portal.

**Before You Begin**

Be sure that you have the security privileges to add new ITYPEs and to create or edit records in these tables:

- `circ_privilege_code`
- `location`
- `item_status`
- `btype`
Setting Up Advanced Booking

This section explains these topics:

- Setting Up a Bookable ITYPE
- Setting Up Circulation Privileges for Advanced Booking
- Setting Up a Location View with Advanced Booking
- Setting Up an Item Status for Advanced Booking
- Setting Up a BTYPE with Advanced Booking

Setting Up a Bookable ITYPE

You must create a bookable ITYPE for items that you want to let users book in advance. Once you create the ITYPE, you must assign it to all of the item records that you want to allow users to book in advance.

Instead of flagging all items of a single type (such as books) as bookable, you can create subsets of a type. This lets you create some ITYPES that can be booked, some that cannot be booked. (For example, in addition to a normal ITYPE for books, you might create these other book ITYPES: “bk_non” as books that can be booked but not overnight; “bk_on” as books that can be booked overnight; and “non_bk” as books that cannot be booked.)

To set up a bookable ITYPE

1. Log in to your Horizon database.
2. Open or create an ITYPE for items that you want to let users book in advance.
   (For instructions, see “Defining an Item Circulation Type (ITYPE)” on page S-7.)
3. Mark the Bookable box to make items using this ITYPE bookable in advance.
4. If your advanced booking items have an hourly due time that may extend past the closing time of the library, do one of these options for the Take Overnight? check box:
   - If you want to let borrowers keep an item that would be due after closing time until after the library reopens, mark this box.
   - If hourly items must be returned before closing regardless of the hourly rate, do not mark this box.
5. Add this ITYPE to all item records for items that you want to let users book in advance.
   (For instructions on editing an item record, see “Using the Item Group Editor” or “Editing Item Group Records” in the “Item and Copy Records” chapter of the Circulation Guide.)
6. Set up the circulation privileges for Advanced Booking.
   (For instructions, see “Setting Up Circulation Privileges for Advanced Booking” on page S-129.)
Setting Up Circulation Privileges for Advanced Booking

You must set up these circulation privileges for Advanced Booking:

- Allow Advanced Booking
- Booking Increment
- Maximum Advanced Booking Days
- Loan Period
- Holding Interval
- Early Pickup Interval

To set up circulation privileges for Advanced Booking

1. Start the Circ Privileges Table process.
   The default location of this process is the Circulation\Circulation Control Menu folder on the navigation bar.
   (For more information about circulation privileges, see “Setting Up Circulation Privileges and Parameters” on page S-51.)

2. Do these steps to turn on Advanced Booking in Horizon:

   1. Create or edit the Allow Advanced Booking privilege for the location that you want.
   2. Mark the Allow Booking option.
   3. Be sure the Location Group has the correct location for the bookable ITYPE.
   4. Set the Default value at “1”.
   5. Save your changes.

3. Do these steps to set up the booking increment:

   1. Create or edit the Booking Increment privilege for the location that you want.
      This sets the intervals at which borrowers can book an item. (For more information, see “Booking Period” on page S-125.)
   2. Mark the Booking Increment option.
   3. Be sure the Location Group has the correct location for the bookable ITYPE.
   4. Set the Default value to the time interval that you want to allow for booking.
      You can enter this in hours or minutes. However, you should may want to set Advanced Booking in multiples of 30 minutes for easier manageability of booking times and intervals.
   5. Save your changes.
Setting Up Advanced Booking

4 Do these steps to specify the number of days or other length of time in advance that borrowers can make bookings:

1 Create or edit the **Maximum Advanced Booking Days** privilege for the location that you want.
2 Mark the **Max. Adv. Booking** option.
3 Be sure the **Location Group** has the correct location for the bookable ITYPE.
4 Set the **Default** value to the maximum length of time that you want to let users book in advance.
5 Save your changes.

5 Do these steps to set up the loan period:

1 Create or edit the **Loan Period** privilege for the location that you want.

   This is the length of time that a bookable item can be checked out. The combination of the item’s owning location and ITYPE plus the booker’s BTYPE determine how long a booked item can be checked out.

   **NOTE**

   If you have an entire location of all bookable items, you can just set the Default value for the loan period of this location, rather than the Exceptions for this location’s loan period.

2 Be sure the **Loan Period** option is marked.
3 In the **Exceptions** group, create or edit an exception for bookable ITYPEs that you have set up.
4 In the **Borr Type Group**, create an exception for any BTYPE to which you want to apply a different bookable loan period.
5 In the **Item Type Group**, create an exception for any ITYPE to which you want to apply a different bookable loan period.
6 Set the **Value** to the loan period that you want for the exception that you are defining.

   **NOTE**

   All bookable ITYPEs must specify an hourly loan period.
7 Save your changes.

6 Repeat steps 3 through 5 for each location’s circulation privileges for which you want to allow advanced booking.

7 Set up the location that you want to use Advanced Booking.

   (For instructions, see “Setting Up a Location View with Advanced Booking” on page S-131.)
Setting Up a Location View with Advanced Booking

For each location for which you want to allow Advanced Booking, you must set up the Advanced Booking fields.

To set up a location view with Advanced Booking

1. Open the location view in the Table Editor.
2. Display the Daily Hours group and complete these fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Booking</td>
<td>Enter the time at which you want to allow Advanced Booking checkouts to start for the day.</td>
</tr>
<tr>
<td>Last Adv Booking CKO</td>
<td>Enter the time at which you want to allow the last Advanced Booking item to be checked out for the day.</td>
</tr>
</tbody>
</table>

**NOTE**
This time must be a time before closing time.

3. If necessary, set an opening and closing time.
4. If you want to allow Advanced Booking on holidays, display the Holidays group and complete these fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Booking</td>
<td>Enter the time at which you want to allow Advanced Booking checkouts to start on holidays.</td>
</tr>
<tr>
<td>Last Adv Booking CKO</td>
<td>Enter the time at which you want to allow the last Advanced Booking item to be checked out on holidays.</td>
</tr>
</tbody>
</table>

**NOTE**
This time must be a time before closing time.

5. Save your changes.
6. Repeat steps 2 through 5 for each location for which you want to allow advanced booking.
7. Set up the Checked In item status.
(For instructions, see “Setting Up an Item Status for Advanced Booking” on page S-132.)
Setting Up an Item Status for Advanced Booking

You must turn on Advanced Booking for any item status that you want to let users book in
advance. (Most likely, this will include your Checked In item status.)

To set up an item status for Advanced Booking

1. Open the item_status view in the Table Editor.
2. Edit the item status that you want to change.
3. Mark the Booking? box.
4. Save your changes.
5. Set up the BTYPEs that can book items in advance.
   (For instructions, see “Setting Up a BTYPE with Advanced Booking” on page S-132.)

Setting Up a BTYPE with Advanced Booking

Once you have your ITYPEs, circulation privileges, locations, and item statuses set up, you can set
up your BTYPEs with Advanced Booking. This lets you choose which library users can book items
in advance and if those users have a limitations in their bookings.

To set up a BTYPE with Advanced Booking

1. Open the btype view in the Table Editor.
2. Open or create the BTYPE for which you want to allow Advanced Booking.
3. Complete these fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max Bookings</td>
<td>Enter the maximum number of bookings allowed for borrowers with this BTYPE.</td>
</tr>
<tr>
<td>Max Bookings/Title</td>
<td>Enter the maximum number of bookings per title allowed for borrowers with this BTYPE.</td>
</tr>
<tr>
<td>Max Bookings/Title/Day</td>
<td>Enter the maximum number of bookings per title per day allowed for borrowers with this BTYPE.</td>
</tr>
<tr>
<td>Max Contiguous Bookings</td>
<td>Enter the maximum number of bookings allowed in a single searching session for borrowers with this BTYPE.</td>
</tr>
</tbody>
</table>

4. Save your changes.
5. Repeat steps 2 through 4 for each BTYPE for which you want to allow advanced booking.
6. Set up Information Portal with Advanced Booking.
   (For instructions, see “Changing Your Library’s Horizon Connection Settings” in the
   “Changing the Setup” chapter of the Information Portal System Administrator’s Guide.)
Setting Recall Rules

Occasionally a borrower has an urgent need for an item, but a different borrower already has the item checked out. You can recall that item before its original due date so that the new borrower can have the item sooner. You can also make sure that the first borrower can keep the item for a guaranteed length of time.

When you recall an item, you can set up Horizon to notify the person who currently has the item checked out that the item is now due sooner than its original due date.

For example, suppose a student checked out a projector on Monday, with a due date of Friday. A professor needs the projector on Thursday. The student has a guaranteed loan period of two days. If you recall the projector, Horizon notifies the student that he or she should bring the projector back on Wednesday so that the professor can check it out. The recall also changes the due date on the projector so that if the student does not return it on Wednesday, it becomes overdue.

Horizon does these things when you recall an item:

- **Assigns a reason for the recall of the item.** You set up the reasons that Horizon can assign. (For more information, see “Setting Up or Editing a Recall Reason” on page S-135.)

- **Assigns a new due date for the item.** Horizon checks to see if a new due date should be assigned to the item being recalled. Several factors combine to determine whether a date earlier than the original due date should be assigned:
  - **Original due date for the item.** If the item has been renewed, the original due date is the date calculated by the last renewal transaction, not the due date calculated when the item was first checked out.
  - **Recall loan period.** The recall loan period determines the number of days, hours, or minutes an item with the status of “Recall” can remain checked out after the recall is issued before Horizon considers it overdue. (For example, a book may normally have a loan period of fourteen days; however, when a book is recalled, its loan period may change to five days from the date the item is recalled.) In calculating the recall loan period, Horizon also considers any guaranteed loan period (see next bullet) for the item.
  - **Guaranteed loan period.** You can choose to guarantee a minimum amount of time that a borrower can have an item. If the recall loan period calculates a due date that comes before the guaranteed loan period has passed, Horizon adjusts the due date to the next open day after the guaranteed loan period. (For example, if an item checked out on March 1 has a guaranteed loan period of seven days and the recall loan period calculates a new due date of March 5, then the actual recall due date would be the end of the guaranteed loan period, or March 8.) If the recall loan period calculates a due date that comes after the guaranteed loan period, then the new due date is the new recall due date. (For example, if an item checked out on March 1 has a guaranteed loan period of seven days, and the recall loan period calculates a new due date of March 9, then the actual recall due date would be March 9.)

- **Assesses fines, if any, for recalled items.** You can set a fine rate for overdue recalled items that is different from the normal fine rate for that type of item. When a recalled item is overdue, Horizon calculates the fine at the recalled fine rate for the entire period the item is overdue.

  For example, a book may normally have a fine amount of $0.25 for each day it is overdue. If that book is recalled, you can set its fine amount to $2.00 for each day it is past due. If
the book was three days overdue before the library issued the recall, Horizon charges $2.00 a day for those three days as well as for any further overdue days that accrue before the item is returned.

- **Generates recall notices.** You specify the timing and number of recall notices.

This section explains these topics:

- Setting Up or Editing a Recall Reason
- Identifying Locations that Can Recall Items

**Before You Begin**

Make sure you have set up item statuses.

(For instructions, see “Working with Item Statuses” on page S-11.)

**To define recall rules**

1 Define recall reasons.
   (For instructions, see “Setting Up or Editing a Recall Reason” on page S-135.)
2 Define these circulation privileges, and any exceptions to those privileges:
   - **Guaranteed Loan Period.** This privilege sets the length of time that borrowers are guaranteed to have an item. Recalls placed on the item generate a due date past the guaranteed loan period. If you set the guaranteed loan period to zero (but not the recall loan period), Horizon does not use a guaranteed loan period and instead generates a new due date based on the recall loan period.
   - **Recall Loan Period.** This privilege sets the length of time borrowers have to return a recalled item after they are notified that the item has been recalled. You can have Horizon calculate recall due dates without letting any time pass before the recalled item is due by setting the recall loan period to “0” (zero).
   - **Recall Fine Rate.** This privilege sets the amount most borrowers must pay per time period for an overdue recalled item. If you want to, you can set this rate higher or lower than the original fine rate. When a recalled item is overdue, Horizon uses the recall fine rate to calculate the fine for the entire period that the item is overdue. Recall fine amounts can apply to an ITYPE group, a BTYPE group, or a combination of both. Minimum and maximum fine amounts that you set up in ITYPE records apply to recall fine totals as well as regular fines.
   - **First Recall Notice Delay.** This privilege sets the length of time after a recalled item becomes overdue before Horizon generates a first recall notice.
   - **Recall Notice Interval.** This privilege sets the length of time between recall notices after the first recall notice.
   - **Max. Recall Notices.** This privilege sets the maximum number of recall notices sent. This setting works with the block view. (For more information, see “Setting Up Blocks” on page S-86.)
   (For instructions, see “Setting Up Circulation Privileges and Parameters” on page S-51.)
3 Set up the locations that can recall items.
   (For instructions, see “Identifying Locations that Can Recall Items” on page S-136.)
Setting Up or Editing a Recall Reason

When you recall an item, you must enter a reason for the recall. Each reason is linked to an item status that Horizon assigns to the item along with the reason. The status prompts Horizon to alert you when the item is returned.

You should not delete any Horizon-defined recall reasons, but you can modify their descriptions and define how they are used. You can set up as many recall reasons as you need.

To set up or edit a recall reason

1. Make sure item statuses have been set up in your system.
   (For instructions, see “Working with Item Statuses” on page S-11.)

2. Open the recall_reason view in the Table Editor.

3. Choose the recall reason that you want to change, or create a new recall reason.
   Horizon displays the Edit Recall Reason window:

4. Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recall Reason</td>
<td>Enter a unique code that identifies the reason. This is the code that staff members enter when they recall an item. This code can contain up to seven characters.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter an explanation or description of the reason. This comment displays on the Recall Item window in Circulation.</td>
</tr>
</tbody>
</table>
Identifying Locations that Can Recall Items

You can specify the locations that can recall items.

For example, you may want only the reserve location to be able to recall items. If your library consists of a central library with many branches, you may want to let all the branches recall items.

To identify locations that can recall items

1. Set up recalls allowed (parameter 31).
2. In the Value field, do one of these options:
   - If you want to allow recalls from all locations, enter “1”.
   - If you do not want to allow recalls from any location, enter “0” (zero).
3. If you want to create or edit any exceptions, do these steps in the Special Values group:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Item Status</td>
<td>Enter or choose the default status code that you want Horizon to assign to the recalled item. (For example, enter “recall” or “b” for bindery.) This lets Horizon recognize the item when it is returned so that you can deal with the recalled item appropriately.</td>
</tr>
<tr>
<td>Horizon-defined</td>
<td>This is a read-only field that indicates whether the recall reason comes installed with Horizon. If this field displays “Yes,” do not delete the recall reason.</td>
</tr>
</tbody>
</table>

4. Save your changes.

NOTE

The exception value set here overrides the default value for this parameter.
Setting Up a Single Circulation Station for Multiple Locations

You may have defined multiple catalogs for collections that you store in the same physical location. (For example, you may have a reserve bookroom collection in the same building as your main collection, but use a separate Horizon circulation system for each collection.) You can set up Horizon so that one central workstation can handle circulation tasks for all collections in one physical location. This can help keep all circulation statistics in a single database. It can also help you avoid having to put items in transit to move them from one part of your library to another.

Once you set up this functionality, Horizon uses the privileges and parameters for an item’s owning location whenever a borrower checks out an item from any shared location. (For more information, see “Setting Up Circulation Privileges and Parameters” on page S-51.) You can also set sites to show the block fees and fines for only the current location. (For more information, see “Setting Up Blocks” on page S-86.)

To set up a single circulation station for multiple locations

1. If you have not already done so, set up each Horizon location that is part of a physical location where you want all collections to share circulation.
   (For instructions, see “Library Locations” in the “General Setup” chapter of the System Administration Guide.)

2. In the Master Location field for each location, enter the code for the location that will handle the circulation tasks.

3. Save your changes.
Setting Up or Editing Closed Stack Access Parameters

Closed Stack Access (CSA) is a special kind of circulation that lets you provide borrowers access to the items in a closed stack area of a library. If you use Closed Stack Access, you need to set up these circulation parameters in Horizon:

- **CSA Request Privileges.** This determines whether closed stack requests are allowed for locations, ITYPEs, or BTYPEs.
- **Max. CSA Requests.** This sets the maximum number of closed stack requests allowed for each BTYPE.
- **Max. CSA Requests for ITYPE.** This sets the maximum number of closed stack requests allowed for each ITYPE.

(For instructions on defining Closed Stack Access privileges, see “Setting Up Circulation Privileges and Parameters” on page S-51. For more information about Closed Stack Access, see the Closed Stack Access Guide.)

Defining Notices, Invoices, and Reminders

Your library can use Horizon to automatically send printed or electronic messages to borrowers informing them of unresolved library business, such as overdue items, fines, fees, items on hold, or expired holds. You can also send messages automatically using a telephone calling system. You can set up these basic message types:

- **Notices.** Notices are the main type of message sent to borrowers. They include overdue, billing, final, and lost notices. Your library can send multiple notices about a problem. You determine the total number of notices sent for each problem.

  **NOTE**

  When Horizon automatically creates a lost notice, it also places a lost block on the item record. Horizon also bills the borrower for the amount of the lost item, and the item no longer displays as checked out to the borrower.

  If the lost item is later checked in to the library, Horizon adds a credit block to the borrower and assesses the borrower an overdue fine calculated from the due date to the checkin date.

- **Invoices.** Circulation invoices are generally used to bill for library-defined fees. You can create several invoices, and each invoice can contain one or more fee-type blocks. (For example, you might have a monthly invoice sent out which lists interlibrary loan fees. You might have a weekly invoice sent out which lists overdue fines.) Invoices show only new fees that have not been previously invoiced. (For more information on invoices, see “Setting Up Invoices” on page S-142.)
• **Reminders.** Reminders are messages sent to follow up previously sent billing or overdue notices. Any unresolved notices of either type are combined on a single reminder.

---

**NOTE**

You can notify borrowers of fines either with the system-generated fine notice or with invoices. The borrower’s BTYPE determines which type of notice (normal or invoice) borrowers receive. (For more information, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25.) Some settings for notices may also affect invoices.

This section explains these topics:

- Setting Up or Editing Notices and Reminders
- Setting Up Invoices
- Customizing Notices
- Setting Up Telephone Notification
- Setting Up E-mail Notification
- Enabling Borrowers to Receive Pre-overdue Notices
- Setting up Payment Notices to Go to a Borrower’s Parent or Guardian

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**Setting Up or Editing Notices and Reminders**

Horizon processes and compiles notices and reminders automatically during Day End when the appropriate conditions are met. You generate most notices manually in the Circulation Reports process. Once the notices are generated, you print notices and reminders using the Circulation Reports process. (For more information, see the “Notices” chapter of the *Circulation Guide*.)

---

**NOTE**

Even if you have designated in Horizon that borrowers want to receive e-mail notices, you can set a block notice to only print. (For more information, see “Setting Up Blocks” on page S-86.)

---

You can define how and when Horizon processes and compiles notices and reminders.

**To set up or edit notices and reminders**

1. Open the location view in the Table Editor.
   Horizon displays the List Location Parameters window.
2. Choose the location whose notices and reminders you want to set up or edit.
3. Click Edit.
   Horizon displays the Edit Location Parameters window.
4 Display the notice fields:

![Image of notice fields](image)

Fill out these fields to set up notices and reminders.

5 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Return Address</td>
<td>If you want the location’s return address printed on all notices and reminders, mark this box.</td>
</tr>
<tr>
<td>“Address Corr. Req.”</td>
<td>If you want to print “Address correction requested” on all notices and reminders, mark this box.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>If you specify more than one address for your library in the location record, the address code with the first letter closest to the start of the alphabet and marked as a return address will always print as the return address on notices.</td>
</tr>
<tr>
<td>Amt. Owed Before Reminder</td>
<td>Enter the amount that a borrower must owe before Horizon compiles a reminder.</td>
</tr>
<tr>
<td># Overdue Before Reminder</td>
<td>Enter the number of items that a borrower must have overdue before Horizon compiles a reminder.</td>
</tr>
<tr>
<td>Reminder Invoice Delay (days)</td>
<td>Enter the number of days Horizon waits to send a reminder invoice after a regular invoice has been sent and remains unpaid.</td>
</tr>
</tbody>
</table>
### Setting Up or Editing Notices and Reminders

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing Notice Amount</td>
<td>Enter the total amount a borrower owes before Horizon generates a billing notice. Enter the amount in this format: “NN.NN”. NOTE: Billing notices print total amounts owed; they do not itemize individual fines or charges.</td>
</tr>
<tr>
<td>Sort Notices By</td>
<td>Enter the name of a database column from the borrower table that you want Horizon to use to sort notices. You can enter more than one column name by separating them with a comma (do not add spaces). Horizon prints the notices sorted first by the first entry, then by the second entry, and so on.</td>
</tr>
<tr>
<td>Borrower Mailing Label</td>
<td>Enter or choose the mailing label you want Horizon to print for sending notices. (For instructions on setting up mailing labels, see “Labels” in the “General Setup” chapter of the System Administration Guide.)</td>
</tr>
</tbody>
</table>

6 Display the **Generate Billing Notices?** field:

Mark this box to have Horizon process and compile billing notices.

7 If you want Horizon to automatically process and compile billing notices during Day End, mark this box. You must still generate and print the notices from Circulation Reports. (For instructions, see the “Notices” chapter of the Circulation Guide.)

8 Save your changes.
9 Do these steps to identify a block for which you want to send notices:

1. Open the block view in the Table Editor.
   Horizon displays the List Block Types window.
2. Choose the block type for which you want to send notices.
3. In the Action field, mark the appropriate button to specify what action is taken when the block is assigned to a borrower. (For more information, see “Setting Up or Editing a Block Type” on page S-87.)
4. Set up the Notice Language group for each location and BTYPE for which you want to generate notices.
   (For instructions, see “Setting Up Blocks” on page S-86.)
5. Save your changes.
6. Repeat steps 2 through 5 of this table for each block type for which you want to send notices.

10 Set up these circulation privileges:

- **First Notice Delay.** This privilege determines the length of time after an item becomes overdue before Horizon generates a first overdue notice for that BTYPE group.
- **Notice Interval.** This privilege determines the number of days between each overdue notice after the first notice. It also determines the number of days between the last overdue notice and the final notice, and the final notice and the lost notice.
- **Max. Notices.** This privilege determines the maximum number of overdue notices that are sent to most borrowers. Enter a number from 1 to 9. Horizon automatically generates a final notice in addition to the number of notices you define here.

   (For instructions, see “Setting Up or Editing a Circulation Privilege” on page S-55.)

---

**Setting Up Invoices**

Horizon lets you automatically send invoices for fees that you define using fee-type blocks. (For more information on blocks, see “Setting Up Blocks” on page S-86.) An invoice can contain one or more fee-type blocks. You can create as many invoice types as you need.

Each time you print invoices, the new invoices show only new fees that have not been previously invoiced. You can use reminder invoices to show all of the accumulated charges on one borrower’s account on one invoice. You must create borrower invoice formats for each type of invoice.

You generate and print invoices in Circulation Reports. (For instructions, see the “Notices” chapter of the *Circulation Guide.*)
This section explains these topics:

- Specifying Borrower Invoice Criteria
- Setting Up or Editing a Borrower Invoice Format
- Specifying a Reminder Invoice Delay

**Specifying Borrower Invoice Criteria**

You must specify this information in Horizon before you can generate an invoice:

- **Amount Threshold.** This sets the monetary amount borrowers must accrue before Horizon processes and compiles an invoice.
- **Applicable BTYPEs.** This defines the BTYPEs that can receive the invoice.
- **Applicable Fee Blocks.** This defines the fee blocks for which the invoice is used.

**Before You Begin**

Make sure that you edit each BTYPE to which you want to send invoices so that its Fee Notice Type is “Numbered invoice.” (For instructions, see “Setting Up or Editing a BTYPE” on page S-25.)

**To specify borrower invoice criteria**

1. Open the borrower_invoice_criteria view in the Table Editor.
2. Choose the invoice criteria that you want to change, or create a new invoice criteria.
   Horizon displays the Edit Borrower Invoice Criteria window:

   ![Edit Borrower Invoice Criteria Window](image)

3. Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
   | Criteria Code | Enter a unique code that identifies the set of invoice criteria.  
   (For example, a monthly invoice might have the code “mon.”) |
Setting Up or Editing a Borrower Invoice Format

You can specify the information that displays in the header, the borrower information area, and the footer of your invoices. You can specify this information for as many invoice types as you use.

**To set up or edit a borrower invoice format**

1. Open the `borrower_invoice_format` view in the Table Editor.
2. Choose the format that you want to change, or create a new format.

### In this field | Do this
---|---
Last Printed Date | This is a read-only field where Horizon automatically posts the date when you last printed borrower invoices.
Description | Enter a description for the invoice. (For example, enter information telling how often or for what purpose you plan to use the invoice.)
Amount Threshold | Enter the dollar amount that borrowers of the given BTYPEs must accrue before Horizon processes and compiles the invoice.
BType | Enter or choose the code for the BTYPE to which you want to send this invoice type. Click **New** to enter multiple BTYPEs.
Fee Block | Enter or choose the fee blocks that you want this invoice to include. A single invoice can contain several fee types. (For example, your library might use a monthly invoice for both interlibrary loan fees and lost card replacement fees.) Click **New** to add multiple fee blocks.

4. Save your changes.
Horizon displays the Edit Borrower Invoice Format window:

3 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter or choose the code for the location from which the invoices are sent.</td>
</tr>
<tr>
<td>Invoice Type</td>
<td>Mark the type of invoice you want to create:</td>
</tr>
<tr>
<td></td>
<td>• Invoice. An invoice prints only new fees.</td>
</tr>
<tr>
<td></td>
<td>• Reminder Invoice. A reminder invoice prints all fees that have not yet been paid.</td>
</tr>
<tr>
<td>Fee List View</td>
<td>Enter “invoice_fee_list_view”. The invoice_fee_list_view view contains the information Horizon needs to process and compile invoices.</td>
</tr>
<tr>
<td>Invoice Prefix</td>
<td>Enter an invoice prefix. (For example, enter a prefix that indicates which library is sending the invoice.) This field is optional.</td>
</tr>
</tbody>
</table>

4 In the Header group, complete or update these fields (click New to add multiple headers):

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Number</td>
<td>Enter the order in which you want the line of the header you are defining to display.</td>
</tr>
<tr>
<td></td>
<td>You can create a blank line by skipping a number in the line number values (for example, create a line 1 and a line 3 to leave a blank line between line 1 and line 3).</td>
</tr>
</tbody>
</table>
Defining Notices, Invoices, and Reminders

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justify</td>
<td>Mark the justification you want to use for the header line you are defining.</td>
</tr>
<tr>
<td>Text</td>
<td>Enter the message or information you want to print in the header line.</td>
</tr>
</tbody>
</table>

5 Display these fields:

6 In the **Borrower fields** group, complete or update these fields (click **New** to add borrower fields):

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Number</td>
<td>Enter the order in which you want the line of information you are defining to display. You can create a blank line by skipping a number in the line number values. (For example, create a line 1 and a line 3 to leave a blank between line 1 and line 3.)</td>
</tr>
<tr>
<td>Line-Ord</td>
<td>Enter the order in which multiple lines of borrower data display. (For example, if you want the borrower’s city and state to display on the same line as the zip code, the group entry for city and state information might be line number 3 and line order 1; the zip code group entry would also be line number 3 but line order 2, to show its position as second after the city and state.)</td>
</tr>
</tbody>
</table>
7 In the **Footer** group, complete or update these fields (click **New** to add multiple footers):

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix</td>
<td>Enter any text that you want to display at the beginning of the line. Your prefix should include any spaces you want to use before the group entry. (For example, to print “To:” before the borrower’s name, enter “To: ” as the prefix in the borrower name group entry. To insert a comma between the city and state, enter “, ” as the prefix in the group entry for state.)</td>
</tr>
<tr>
<td>Borrower Column</td>
<td>Enter the name of the column from the borrower table that stores the information that you want printed on the invoice line.</td>
</tr>
</tbody>
</table>

8 Save your changes.
Defining Notices, Invoices, and Reminders

Specifying a Reminder Invoice Delay

If you want Horizon to send a second invoice as a reminder when the first invoice has not been paid, you must first create a reminder invoice format for Horizon to use. (For instructions, see “Setting Up or Editing a Borrower Invoice Format” on page S-144.) You should also specify a reminder invoice delay to specify the number of days that Horizon waits after it sends the first invoice to send a reminder invoice.

To specify a reminder invoice delay

1. Open the location view in the Table Editor.
   Horizon opens the List Location Parameters window.

2. Choose the location for which you want to specify a reminder invoice delay.
   Horizon displays the Edit Location Parameters window.

3. Display the Reminder Invoice Delay (days) field:

   Use this field to enter the number of days you want between invoices for this location.

4. In the Reminder Invoice Delay (days) field, enter the number of days that you want Horizon to wait before sending a second invoice after a regular invoice has been sent and remains unpaid.

5. Save your changes.

Customizing Notices

Your library can use Horizon to automatically send printed or electronic circulation notices to borrowers. You can send default notices using the format Horizon provides. However, if you want to, you can also customize your circulation notices. You can use your own report writer program to access notice data from Horizon’s notice tables easily and organize it into different formats.

NOTE

You format notices sent for blocks in the block view. (For more information, see “Setting Up Blocks” on page S-86.)
A typical notice may take this format:

<table>
<thead>
<tr>
<th>Information defined in Area 1</th>
<th>Information defined in Area 2</th>
<th>Information defined in Area 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of library</td>
<td>Name of borrower</td>
<td>Name of borrower</td>
</tr>
<tr>
<td>Address of library</td>
<td>Address of borrower</td>
<td>Address of borrower</td>
</tr>
<tr>
<td>City and State or Region of library</td>
<td>City and State or Region of borrower’s home</td>
<td>City and State or Region of borrower’s home</td>
</tr>
<tr>
<td>Date of notice</td>
<td>Address Correction Requested</td>
<td>Previous balance</td>
</tr>
<tr>
<td></td>
<td>Message from library to borrower (for example, “The following items are overdue” or “This hold request has expired”)</td>
<td>Total due</td>
</tr>
<tr>
<td></td>
<td>Body of notice</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The body of the notice may include a list of fees unpaid or items such as overdue or recalled items, with title, call number, fine amount, due date, or other information the library wants to associate with the item.</td>
<td></td>
</tr>
</tbody>
</table>

(For more information about notice areas, see “Formatting Areas of a Notice” on page S-156.)

This section explains these topics:

- Using Notice Tables
- Setting Up Custom Notice and Form Printing

**Using Notice Tables**

To create your own customized notices, you must access notice information stored in your Horizon database. When you run circulation reports, Horizon stores notice data (including borrower number, item, title, and block type) in three tables. You can use your own program or a third-party report writer to extract the desired information from these three tables and place it anywhere on your notices.

Because each library can use any number of third-party report generators, this section lists only the tables and their columns from which report generators (or library-created programs) can extract notice information. You can print your customized notices and send them through your local postal service or you can send notices by e-mail.
The **notice table** stores information about the borrower (such as the borrower number) and summary information from all the blocks on the notice. It also stores information about the borrower location (such as the library name and address).

<table>
<thead>
<tr>
<th>Column</th>
<th>Contains This Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>add_corr_req</td>
<td>Whether the message “Address Correction Requested” is included in the notice (1=Yes).</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>If you are in the United States, SirsiDynix can customize the text in this message depending on the contract your library has with the United States Postal Service.</td>
</tr>
<tr>
<td>balance</td>
<td>Balance due (if any).</td>
</tr>
<tr>
<td>balance_str</td>
<td>Balance due (formatted).</td>
</tr>
<tr>
<td></td>
<td>Use this column instead of the balance column for third-party report programs, since it is already formatted with dollar signs, decimal points, and so forth.</td>
</tr>
<tr>
<td>batch#</td>
<td>System-assigned number of the batch that contains the notice.</td>
</tr>
<tr>
<td>borrower#</td>
<td>System-assigned number of the borrower record for the borrower who receives the notice.</td>
</tr>
<tr>
<td>content#</td>
<td>Notice that the line represents (first, second, and so forth).</td>
</tr>
<tr>
<td>invoice#</td>
<td>Number of the invoice.</td>
</tr>
<tr>
<td>location</td>
<td>Code for the location to which the borrower belongs.</td>
</tr>
<tr>
<td>output_date</td>
<td>Date that the notice was created in Horizon.</td>
</tr>
<tr>
<td>total_amount</td>
<td>Total amount owed (if any).</td>
</tr>
<tr>
<td>total_amount_str</td>
<td>The total amount owed (formatted).</td>
</tr>
<tr>
<td></td>
<td>Use this column instead of the total_amount column for third-party report programs, since it is already formatted with dollar signs, decimal points, and so forth.</td>
</tr>
</tbody>
</table>

The **notice_batch table** contains information about each batch of notices that you create in Circulation Reports.

<table>
<thead>
<tr>
<th>Column</th>
<th>Contains This Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>batch#</td>
<td>System-assigned number that identifies the batch that contains the notice.</td>
</tr>
<tr>
<td>comment</td>
<td>Message or note about the notice batch.</td>
</tr>
</tbody>
</table>
Customizing Notices

The **notice_content table** stores more detailed information about individual unresolved blocks on a borrower’s record.

<table>
<thead>
<tr>
<th>Column</th>
<th>Contains This Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>emailed</td>
<td>Number of e-mailed notices contained in the batch.</td>
</tr>
<tr>
<td>last_output_date</td>
<td>Date the batch was last used to create notices.</td>
</tr>
<tr>
<td>last_output_time</td>
<td>Time the batch was last used to create notices.</td>
</tr>
<tr>
<td>printed</td>
<td>Number of printed notices contained in the batch.</td>
</tr>
<tr>
<td>send_email</td>
<td>Whether the notice was sent by e-mail.</td>
</tr>
<tr>
<td>times</td>
<td>Number of times the batch has been used to create notices.</td>
</tr>
<tr>
<td>type</td>
<td>Type of notice.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Column</th>
<th>Contains This Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>amount</td>
<td>Amount owed for the item (if any).</td>
</tr>
<tr>
<td>amount_str</td>
<td>Amount owed (formatted). Use this column instead of the amount column for third-party report programs, since it is already formatted with dollar signs, decimal points, and so forth.</td>
</tr>
<tr>
<td>author</td>
<td>Name of the item’s author.</td>
</tr>
<tr>
<td>batch#</td>
<td>System-assigned number of the batch in which the notice is contained.</td>
</tr>
<tr>
<td>block</td>
<td>Block code for which the notice is created.</td>
</tr>
<tr>
<td>block_descr</td>
<td>Description of the block for which the notice is created.</td>
</tr>
<tr>
<td>burb_ref#</td>
<td>Number of the block in the borrower’s record.</td>
</tr>
<tr>
<td>call_number</td>
<td>Call number of the title for which the notice is created.</td>
</tr>
<tr>
<td>comment</td>
<td>Notes or a message about the notice or block.</td>
</tr>
<tr>
<td>content#</td>
<td>Notice that the line represents (first, second, and so forth). This number is used with batch# to link each line in this table to a particular notice in the notice table.</td>
</tr>
<tr>
<td>copy</td>
<td>Copy of the title for which the notice is created.</td>
</tr>
</tbody>
</table>
Setting Up Custom Notice and Form Printing

Horizon lets you format circulation notices so that you can more easily print on data mailers or postcards. You set printer properties and form size in your workstation’s operating system. In Horizon, you specify notice type, print media, page width, and page height. In addition, the circulation notice is divided into three areas where you can format content and dimensions according to the type of notice you are creating and the needs of your library.

This section explains these topics:

- Setting Up Custom Form Printing
- Setting Up a Circulation Notice Format
- Formatting Areas of a Notice

<table>
<thead>
<tr>
<th>Column</th>
<th>Contains This Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>date</td>
<td>Applicable date. (For example, an overdue notice would have an overdue date.) This field is null where dates do not apply (such as with fines).</td>
</tr>
<tr>
<td>expire_date</td>
<td>Date a hold expires.</td>
</tr>
<tr>
<td>group_id</td>
<td>Groups items by block type. (For example, overdues would be listed together, fees would be listed together, and so forth.)</td>
</tr>
<tr>
<td>ibarcode</td>
<td>Barcode of the item for which the notice is created.</td>
</tr>
<tr>
<td>item_location</td>
<td>Location code of the item to which the notice applies.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>You can use only one location in each report (either item_location or pickup_location).</td>
</tr>
<tr>
<td>notice_block_language</td>
<td>Message included on the notice (for example, “The following items are overdue.”). This message comes from the Default Language field on the block table. (For more information, see “Setting Up Blocks” on page S-86.)</td>
</tr>
<tr>
<td>pickup_location</td>
<td>Identifies the hold’s pickup location, if the notice is for a hold.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>You can use only one location in each report (either pickup_location or item_location).</td>
</tr>
<tr>
<td>price</td>
<td>Price of the item for which the notice is created.</td>
</tr>
<tr>
<td>title</td>
<td>The title of the item for which the notice is created.</td>
</tr>
</tbody>
</table>
Setting Up Custom Form Printing

To print custom forms, you need to set up the form size for the printer you use. You do this by setting up the operating system’s printer settings.

You may also need to change settings on the printer itself to print custom forms. (For more information about printing custom form sizes, see your printer’s documentation.)

NOTE

To prevent slow printing, make sure that the Andale WT J font has been copied to your print server. (For more information, see “System Administrator Basics” in the “Getting Started” chapter of the System Administration Guide.)

To set up custom form printing in Windows

1. Access the print server properties for the printer that you want to set up. Here is an example of the Windows XP Print Server Properties window:

   ![Print Server Properties Window]

2. Create and save a new form, or copy an existing form and edit it.

3. Specify any or all of these things:
   - Units (metric or English)
   - Paper width
   - Paper height
   - Printer margins

4. Set the printer as your default printer, or make sure to choose it when you print custom forms.

5. Set your printer preferences to match the shape of your form (landscape or portrait).

Setting Up a Circulation Notice Format

You can determine the appearance of your notices. You set up the basic format first; then you can specify the information that Horizon prints in each of three areas. (For more information, see “Formatting Areas of a Notice” on page S-156.)
To set up a circulation notice format

1. Open the `print_format_block` view in the Table Editor. Horizon displays the List Print formats for Circulation blocks window.
2. Choose the location’s circulation notice that you want to change, or create a new circulation notice. Horizon displays the Edit Print formats for Circulation blocks window:
3  Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter or choose the location for which you are specifying the notice format. Do not enter a location in this field if you use preprinted forms that already contain your location information such as name and address.</td>
</tr>
</tbody>
</table>
| Notice Type           | Mark the option for the type of notice format you are creating:  
  - **Auto.** Mark this option if this format will be processed and compiled by Day End automatically.  
  - **Not used.** These options are reserved for future use.  
  - **Reminder.** Mark this option if this format is for a Reminder notice.  
  - **New Debt.** Mark this option if this format is for a new Horizon Debt Collect notice.  
  - **Upd. Debt.** Mark this option if this format is for an update Debt Collect notice. |
| Print Media           | Mark the option for the type of material you plan to use to print notices that use this format:  
  - **Letter**  
  - **Letter, Sectioned**  
  - **Postcard**  
  - **Data Mailer**  
  - **Custom** |
| Page Width            | Enter the page width for notices with this format. You must enter the width to the closest whole number.                                                                                     |
| Height                | Enter the page height for notices with this format. You must enter the height to the closest whole number.                                                                                      |
| New Page per Block    | If you want a new page for each circulation block that prints, mark this box.                                                                                                                        |
| Print Area3 On Each Page | Mark this box if you want Area 3 to print on each page.  
(For more information, see “Formatting Areas of a Notice” on page S-156.)                                                                 |
| No Page Breaks        | Mark this box if you do not want any page breaks in this notice format.                                                                                                                           |

4  Save your changes.
Formatting Areas of a Notice

Horizon lets you format three areas when you design a notice. You can use any or all of these areas to customize how your notices print. (For example, you can use Area 1 to format the borrower address, Area 2 to format a message area, and Area 3 to format instructions to submit payment.) Typically, Area 1 holds header information; Area 2 holds the body of the notice, and its information prints once for each item on the notice; and Area 3 contains the footer and any applicable totals of amounts due. Each area can have as many lines as you need.

You can use any of the columns in Horizon’s notice tables to customize your notices. (For more information, see “Using Notice Tables” on page S-149.)

To format areas of a notice

1. Open the print_format_block view in the Table Editor.
   Horizon displays the List Print formats for Circulation blocks window.
2. Choose the notice type you want to format.
   Horizon displays the Edit Print formats for Circulation blocks window.
3. Display the area you want to format (Area 1, Area 2, or Area 3). Here is an example of an Area group:

   ![Edit Print formats for Circulation blocks](image)

   Click **New** to create a new Circulation Slip Field.

4. Choose the area definition that you want to change, or create a new area definition.
   Click **New** to add multiple areas.
Complete or update these fields for each area of the notice:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ord</strong></td>
<td>Enter the order in which the line that you are specifying will display in the area of the notice.</td>
</tr>
</tbody>
</table>
| **Use**       | Mark one of these options:  
|               | • **Line/Pos.** Mark this option to use the line and position parameters for positioning this line on the notice.  
|               | If you mark this option, enter information in the Line and Position fields also.  
|               | • **Next Line.** Mark this option to print this line on the next line.  
|               | • **Prev. Line.** Mark this option to print this line on the same line as the previous line.  
|               | • **Append.** Mark this option to append this line to the previous line. |
| **Line**      | If you marked Line/Pos. in the Use field, enter the vertical line position number where you want this line to display. |
| **Position**  | If you marked Line/Pos. in the Use field, enter the horizontal position at which this line should begin. |
| **Print If Empty** | If you want Horizon to print this line on the notice even if the line is empty, mark this box.  
|               | SirsiDynix recommends that you leave this box unmarked. This will keep Horizon from leaving a blank line in your notice. |
| **Print Once** | If you want Horizon to print this line only once on the notice, mark this box.  
| (This option does not apply to Area 2.) | (For example, you may want to print a name line more than once on the invoice. If so, leave this box unmarked.) |
| **Field Type** | Enter or choose the field type of this line on the notice.  
<p>|               | You must use a predefined code. (For a list of codes and their descriptions, see “Using Field Type Codes” on page S-174.) |</p>
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Enter any text that you want to display by default on this line.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td>If you do not print “Address Correction Requested” automatically on each notice, you can add the required text here, depending on the contract your library has with the Postal Service. (For more information on automatically printing, see “Setting Up or Editing Notices and Reminders” on page S-139.)</td>
</tr>
<tr>
<td>Column Name</td>
<td>Enter the database column name from which Horizon takes the data that you want to display on this line.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Using Notice Tables” on page S-149.)</td>
</tr>
<tr>
<td>Field Length</td>
<td>Enter the field length (number of characters) for this line.</td>
</tr>
<tr>
<td>Max. to Print</td>
<td>Enter the maximum number of fields to print on this line.</td>
</tr>
<tr>
<td>Word Wrap</td>
<td>If you want this line to wrap to the next line if it contains more characters than will fit in the width of the form you want to use, mark this box.</td>
</tr>
<tr>
<td>Underline</td>
<td>If you want Horizon to underline text in this line, mark this box.</td>
</tr>
<tr>
<td>Justify</td>
<td>Choose the justification to use for the area:</td>
</tr>
<tr>
<td></td>
<td>• Left</td>
</tr>
<tr>
<td></td>
<td>• Center</td>
</tr>
<tr>
<td></td>
<td>• Right</td>
</tr>
<tr>
<td>Area 2 Maximum Lines</td>
<td>Enter the maximum number of lines to print for Area 2.</td>
</tr>
<tr>
<td>(This option applies only to Area 2.)</td>
<td>This defines the area for the body of the message. Use a maximum that fits in the notice medium (for example, a data mailer or postcard).</td>
</tr>
<tr>
<td></td>
<td>If the notice data does not fit on one form, Horizon prints multiple forms.</td>
</tr>
</tbody>
</table>

6 To specify how to display the address, use the addr, baddr, or gaddr codes for the **Field Type**. The addr field only prints the address (no name). The baddr field prints the borrower name and address. The gaddr field prints the parent or guardian name, borrower name, and address. You can also use the guard field to print the parent or guardian name only. For more information about the gaddr and guard codes, see “Setting up Payment Notices to Go to a Borrower’s Parent or Guardian” on page S-169.

7 To format a date and time field, complete step 6 in “Formatting Date and Time on Receipts and Notices” on page S-184.
Setting Up Telephone Notification

You can choose to use automated telephone messaging instead of postal or electronic notification. You must enable telephone messaging if you use any automated telephone messaging product. If you use the Horizon Telephone Messaging product, you need to do some additional setup in Horizon.

This section explains these topics:

- Enabling Telephone Notification
- Setting Up Horizon Telephone Messaging Options

Enabling Telephone Notification

Your library can choose to send telephone messages informing borrowers of unresolved library business, such as overdue items, fines, fees, items on hold, or expired holds. You can have staff make the calls manually. You can also have Horizon make calls automatically by using an automated telephoning program such as Horizon Telephone Messaging. (For more information about Telephone Messaging, contact your SirsiDynix add-on sales representative.)

To enable telephone notification

1. Open the phone_type view in the Table Editor.
   Horizon opens the List Phone Type window.
2. Choose the phone type you want to enable.
   Horizon opens the Edit Phone Type window:

   ![Edit Phone Type Window]
   
   Marking this field enables all types of phone notification.

   Phone Type: phone_type
   No. of Phones: 5
   Telephone Messaging enabled: enabled
   Description: Home

8. Save your changes.
9. Repast steps 3 through 6 to format additional areas.
3 Verify that the **Telephone Messaging enabled** box is checked.

### NOTE

If you intend to do automated telephone notification of any kind, you must mark the Telephone Messaging enabled box on the Edit Phone Type window. You must do this even if you do not use Horizon Telephone Messaging.

4 Save your changes.

### Setting Up Horizon Telephone Messaging Options

If you use Horizon Telephone Messaging, you need to set up these circulation parameters in Horizon:

- Telephone Messaging: Number of days to call before overdue notice is sent (circulation parameter 42)
- Telephone Messaging: Number of days to call after hold is filled and before notice is sent (circulation parameter 43)

(For general instructions on setting up parameters, see “Setting Up or Editing a Circulation Parameter” on page S-59. For more information about Telephone Messaging, see the *Telephone Messaging Guide*.)

### Setting Up E-mail Notification

You can choose to give borrowers the option to receive e-mail notices instead of using printed notices or telephone contact. You can set up and configure e-mail notices in Horizon, and then generate and automatically send those notices to your borrowers using Circulation Reports. The information in e-mail notices and printed notices is identical.

You can also set up Horizon to generate an e-mail text file using information stored in notice tables. You can use a third-party program to access the e-mail text file, modify it, and send it as a customized e-mail message.

### IMPORTANT

You must set up an SMTP server before Horizon can automatically send e-mail. You must also set each individual borrower record to receive e-mail. (For instructions, see “Printing or E-mailing Notices, Invoices, and Reminders” in the “Notices” chapter of the *Circulation Guide*.)

Any e-mail messages that fail to send or that are rejected for any reason (such as an incorrect borrower e-mail address) bounce back to your e-mail server. This lets you see any messages that you need to resend. You can also choose to send blind copies of e-mail notices to the library. This is an easy way to keep track of notices that are correctly sent. It also lets you easily resend notices if
your e-mail server bounces only a notice that tells you a message was undeliverable instead of bouncing a duplicate of the unsent message. If you cannot resend an e-mail notice, you may be able to use Circulation Reports to force print the notice. (For more information, see “Printing or E-mailing Notices, Invoices, and Reminders” in the “Notices” chapter of the Circulation Guide.)

This section explains these topics:

- Setting Up Library and Block E-mail Information
- Overriding the Default E-mail Settings
- Understanding Horizon’s E-mail Flat-File Structure

**Setting Up Library and Block E-mail Information**

You must store your library’s e-mail information in Horizon if you want to automatically send e-mail notices. You can also define the message you want to use for e-mail block notices, and choose to send some block notices only in print instead of by e-mail.

This section explains these topics:

- Setting Up Library E-mail Information
- Specifying a Block E-mail Notice Message

**Setting Up Library E-mail Information**

You must store your library’s e-mail information in Horizon before you can automatically send e-mail notices.

**To set up library e-mail information**

1. Open the `email_param` view in the Table Editor.
   Horizon opens the List E-mail Parameters window.
2. Choose the e-mail parameters you want to edit.
   Horizon opens the Edit E-mail Parameters window:
Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Flat File Only   | If you want to create your own e-mail messages with third-party software instead of letting Horizon generate them automatically, mark this box.  
(For more information, see “Using Notice Tables” on page S-149 and “Understanding Horizon’s E-mail Flat-File Structure” on page S-165.) |
|                  | NOTE                                                                                                                                  |
|                  | If you choose this option, you do not need to enter SMTP server information.                                                          |
| SMTP Host        | Enter the address of your SMTP server.                                                                                                                                                           |
| SMTP Port        | Enter the port that your SMTP server uses.                                                                                                                                                       |
| SMTP user ID     | Enter the user ID of the staff member who can access the SMTP server.                                                                                                                            |
| SMTP Password    | Enter the password of the staff member who can access the SMTP server.                                                                                                                           |
| From E-mail address | Enter the default e-mail address that you want to use as the “from” address.                                                                                                                     |
| Reply to E-mail  | Enter the default e-mail address where you want to receive e-mail replies.                                                                                                                         |
| BCC address      | If you always want to send a blind copy of the e-mail messages that your library sends, enter the default e-mail address that should receive the copy.                                             |
| Subject          | Enter the default subject line that you want to use for all e-mail sent from this library.                                                                                                         |

Save your changes.
Specifying a Block E-mail Notice Message

You can specify the message that Horizon uses in e-mail notices for a block. If you have set up a borrower to receive e-mail, blocks on that borrower’s record use the message you specify in notices to that borrower.

To specify a block e-mail notice message

1. Open the block view in the Table Editor.
2. Choose the block type whose e-mail language you want to specify.
3. Display the Default Email Language field and enter the text you want to use for this block in e-mail notices.
   Horizon sends this block message to borrowers of the BTYPE and location specified.
   If you do not enter text in the field, Horizon uses the regular notice text. (For more information on block notices, see “Setting Up or Editing a Block Type” in the Circulation Setup Guide.)
4. Save your changes.

Overriding the Default E-mail Settings

If you want to create a special e-mail setting for a specific location, you can override the default e-mail settings that you created in the email_param view.

To override the default e-mail settings

1. Open the location view in the Table Editor.
   Horizon opens a List Location Parameters window.
2. Choose the location whose e-mail settings you want to customize.
   Horizon opens an Edit Location Parameters window.
3. In the Name field, make sure the location name displays.
4. Display the e-mail fields:
5 Use the drop-down list to choose the address whose default e-mail address you want to override.

6 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Usage         | Mark Return. **IMPORTANT**
|               | You can mark this field for only one address for each location. Otherwise, Horizon does not know which address to use for return mail. |
| Email         | Enter the e-mail address you want to use as the location’s “from” address. |
| Reply To      | Enter the e-mail address where you want to receive this location’s e-mail replies. |
| BCC           | If you always want to send a blind copy of the e-mail messages that this location sends, enter the address that should receive the copy. |
| Subject       | Enter the subject line you want to use for any e-mail sent from this location. |

7 Save your changes.
8 If you want to change the default e-mail message, do these steps:

1. Open the **block** view in the Table Editor.
2. Choose the block whose message you want to change, or click **New** to create a new one.
   Horizon displays the Edit Block Types window.
3. Display the **Notice Language** group:

   ![Edit Block Types window](image)

4. If you want to use the new message *in addition to* the one you entered in the Default Email Language field, mark **Append**.
   Click **New** to add multiple messages.
5. In the **Email Notice Language** field, enter the message you want to append to, or use instead of, the default e-mail message.
   Click **New** to add multiple messages.
6. Save your changes.

### Understanding Horizon’s E-mail Flat-File Structure

Horizon’s automated e-mail send process uses a data flat-file to extract and build e-mail notices. If your library wants to use a non-Horizon extraction and e-mail sending process, you can use the same flat-file.

Here is the flat-file structure for e-mail notices as defined in Horizon:

```plaintext
Header line (is all one line)
########<1h><0h><1h>borrower name<1Fh>borrower email<1Fh>subject<1Fh>from address name<1Fh>
from e-mail address<1Fh>reply to e-mail address<1Fh>BCC e-mail address<1Fh>batch number <1Fh>content number<iFh><\n>
Body information (starts on next line following the header line)
line<\n>
line<\n>
...
<1Fh><1Dh>
```

The e-mail structure repeats for each e-mail message in the flat-file.
Defining Notices, Invoices, and Reminders

Horizon e-mail notices use information from the Addresses group of the location view to define these elements:

- From Address Name
- From E-mail Address
- Reply to E-mail Address
- BCC E-mail Address

If the location’s Addresses group fields contain no information, Horizon looks for the e-mail addresses in the email_param view. If those fields contain no information, these elements will not display in the e-mail messages that you send.

The batch number and content number refer to the corresponding rows in notice_batch, notice, and notice_content tables from which the e-mail is created.

You can extract other information for your e-mail messages from the columns in the notice and notice_content tables. (For more information, see “Using Notice Tables” on page S-149. For instructions on formatting notices, see “Setting Up a Circulation Notice Format” on page S-153.)

Enabling Borrowers to Receive Pre-overdue Notices

Pre-overdue notices alert patrons a specified number of days in advance of an item due date. This notice is sent to the borrower’s email address; therefore, the borrower record must have a valid email address in order for the pre-overdue notice to reach the borrower.

By default, the pre-overdue notice setting for each borrower is disabled. The upgrade launcher allows you to run an optional post-upgrade step that enables pre-overdue notices for all borrower records that have an email address.

You might want to run this post-upgrade step if the majority of your borrowers should receive pre-overdue notices. If you want to make sure each borrower’s information is accurate before enabling pre-overdue notices, do not run the post-upgrade step. However, if you do not run this post-upgrade step, you must manually update the pre-overdue setting for each borrower who wants to receive a pre-overdue notice.

This section explains these topics:

- Enabling Pre-overdue Notices for a Borrower
- Specifying the Number of Days Before the Pre-overdue Notice is Sent
- Customizing Pre-overdue Notice Email Text
- Customizing the Pre-overdue Notice Email Layout
- Running the Pre-overdue Notice Process

Enabling Pre-overdue Notices for a Borrower

If you did not run the optional Horizon 7.4.1 post-upgrade step to enable pre-overdue notices for all borrowers, then you must manually update each borrower record for whom you want to receive pre-overdue notices before the due date of their checked out item.

To enable pre-overdue notices for a borrower

1. Open the Horizon client and log in.
2. Go to Administration > Table Editor.
3. Select the borrower_dms table, and then click OK.
4. Select the borrower for whom you want to enable pre-overdue notices, and then click **Edit**.

5. Alternately, you can open the borrower record in the Checkout window and enable the pre-overdue notice setting there.

6. Expand the window or page down until you find the PreOverdue checkbox (usually near the email address field).

7. Mark the **PreOverdue** checkbox to enable pre-overdue notices for the borrower.
   Clear the checkbox to disable pre-overdue notices and to stop sending notices to the borrower.

8. Type an email address in the **Email: Internet Addr.** field.

9. Click **Save** to save your settings, and then click **Close** to close the window.

### Specifying the Number of Days Before the Pre-overdue Notice is Sent

In addition to enabling pre-overdue notices for a borrower, you must specify how many days before the item due date to send out the pre-overdue notice.

**To specify the number of days before the pre-overdue notice is sent**

1. Go to **Administration > Table Editor**.

2. Select the **btype** table, and then click **OK**.

3. Select one or more Borrower Circulation types for which you want to change the number of days, and then click **Edit**.

4. Click **Page Down** to get to page 2 of the table fields.

5. In the **Pre-Overdue Day** field, type an integer for the number of days before the due date that the system should email the patron.

6. Click **Save** to save your settings, and then click **Close** to close the window.

Pre-overdue notices of daily checkouts (not hourly checkouts) will now be sent to the email address of borrowers who have requested the pre-overdue notice.
Customizing Pre-overdue Notice Email Text

You can use the default text for pre-overdue notices, or you can specify a custom message for the email.

To customize the pre-overdue notice email text

1. Go to Administration > Table Editor.
2. Select the block table, and then click OK.
3. Select the Pre-Overdue notice block, and then click Edit.
4. Click Page Down to get to page 2 of the table fields.
5. In the Default Email Language field, use the default text or type a different message to appear in the email notice.
6. Click Save to save your settings, and then click Close to close the window.

Customizing the Pre-overdue Notice Email Layout

You can use the default layout for the pre-overdue notices or you can specify a custom layout.

To customize the pre-overdue notice email layout

1. Go to Administration > Table Editor.
2. Select the print_format_block table, and then click OK.
3. Select the Pre-Overdue Notices block for the agency or agencies for which you want to modify the layout, and then click Edit.

4. Specify the settings to use for the notice. The default formatting is already set up for you.
   - The Area 1 field group lets you specify the display for the top of the pre-overdue notice. The default layout displays the agency information, borrower information, and the current date.
   - The Area 2 field group lets you specify the display for the middle of the pre-overdue notice. The default layout displays the wording that you entered in the Default Email Language field, as well as item and fee information. (For more information, see “Customizing Pre-overdue Notice Email Text” on page S-168).
   - The Area 3 field group lets you specify the closing section of the pre-overdue notice. The default layout displays the balance and total fee information for the patron.
5. Click Save to save your settings, and then click Close to close the window.

Running the Pre-overdue Notice Process

As with all other notices, you must manually run the pre-overdue notice process. Within Circulation Reports there is an additional option for new batches to run preoverdue notices.

For more information, see the Circulation Guide.
Setting up Payment Notices to Go to a Borrower’s Parent or Guardian

You can set up Horizon to send payment notices to a borrower’s parent or guardian who resides at the same address as the borrower.

To set up a payment notice to go a borrower’s parent or guardian

1. Open the Horizon client and log in.
2. Open a Checkout window.
3. Find the borrower for whom you want to edit settings.
4. Select Borrower > Edit Borrower.
5. Click Page Down to get to page 3 of the table fields.
6. To enable sending the notice to a parent or guardian, mark the Notice to Guardian checkbox. To disable the feature, clear the checkbox.
7. In the Parent / Guardian field, type the name of the person to whom you want to send the payment notice.
8. Click Save to save your settings, and then click Close to close the borrower record.
9. Go to Administration > Table Editor.
10. Select the print_format_block table, and then click OK.
11. Select the Circulation block for which you want to set up parent/guardian information, and then click Edit.
12. Add the guard code for the Field Type to an area of the Circulation block by clicking New for that area.
13. The guard field prints the value from the Parent / Guardian field (from the borrower record) on the notice. If the Notice to Guardian checkbox is not marked in the borrower record, nothing displays for this field on the payment notice, even if the Parent / Guardian field contains a value.

**NOTE**

You can also use the gaddr field to print the parent/guardian name followed by the borrower name and then the address.

14. If necessary, you can add a Text field to an area on the Circulation block. This allows you to add text in front of the parent/guardian name. For example, type Parent/Guardian: in the Text field.
15. Click Save to save your settings, and then click Close to close the window.

Using Circulation Slips and Receipts

Horizon lets you attach a printer to a workstation at your circulation desk to print circulation slips that describe library transactions. You can print two types of circulation slips with an appropriate printer: receipts for borrowers and workslips for staff members.
Each workstation needs its own printer. Circulation slips are designed for printing on continuous feed cash register tape, but you can also print on pre-formatted slips or plain paper. You need a separate 40-column printer for each circulation workstation that you want to use to print circulation slips. If you want to, you can order printers from SirsiDynix.

You can choose from several impact and thermal models. Impact printers use characters to strike the paper and typically have automatic cutting and spooling options for duplicate receipts. Thermal printers use heat to print on the paper. You can get parallel or serial models of either printer, but SirsiDynix recommends parallel.

If you use a serial printer, you must configure the port. At each workstation, you must also define which circulation slips and workslips that workstation can print.

This section explains these topics:

- Configuring a Serial Port for Circulation Slip Printing
- Customizing Circulation Slips
- Using Workstation Receipts

---

**Configuring a Serial Port for Circulation Slip Printing**

When you set up a circulation printer, you first connect it to a workstation port. If you use a serial port, you must configure the port. Then you set up Horizon to recognize and control the printer. (For instructions on Horizon printer settings, see “Using Workstation Receipts” on page S-179.)

**To configure a serial port for circulation slip printing**

1. Access the port settings window for the serial port you want to set up.
   (For example, in Windows 2000, you access ports in the Device Manager area on the Hardware tab in the System Properties section of the Control Panel.)

2. Use this table as a guide in setting port options:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bits per second</td>
<td>9600</td>
</tr>
<tr>
<td>Data bits</td>
<td>8</td>
</tr>
<tr>
<td>Parity</td>
<td>None</td>
</tr>
<tr>
<td>Stop bits</td>
<td>1</td>
</tr>
<tr>
<td>Flow control</td>
<td>Xon/Xoff</td>
</tr>
<tr>
<td></td>
<td>If you use an Epson printer set to use dsr/dtr, set flow control to <strong>None</strong>.</td>
</tr>
</tbody>
</table>

3. Save your changes.

4. If you use an Epson printer, do one of these options:
Customizing Circulation Slips

Horizon comes with default circulation slips that your staff can print for borrowers and to help clarify your library’s work flow. You can also customize the appearance of a circulation slip and add a message to it. At each workstation, you choose which slips and receipts you want to print, and set up Horizon to recognize and control each printer.

This section explains these topics:

- Defining a Custom Circulation Slip
- Using Field Type Codes
- Creating a Circulation Slip Message
- Masking Information on Patron Receipts
- Printing Request Table Information

Defining a Custom Circulation Slip

You can edit the fields in Horizon’s default circulation slips to create customized slips. You can also copy the default slips and edit them to create new slips. You specify the information that Horizon includes on each type of circulation slip and how that information displays in these views:

- **Circ_slip.** This view holds the formatting and identifies where Horizon should find most of the content for a circulation slip.

- **Circ_slip_message.** This view lets you create messages and link them to a specific circulation slip for a specific location and ITYPE. (For example, the due date circulation slip for the audio-visual location and ITYPE videocassette could include a message that says, “Please rewind videos before returning them to the library.”)

To define a custom circulation slip

1. Open the circ_slip view in the Table Editor.
2. Do one of these options:

   - If your Epson printer is set to use Xon/Xoff, set the #3 DIP switch on your printer to the “On” position:

     Printer Switch Xon/Xoff:

   - If your Epson printer is set to use dsr/dtr, set the #3 DIP switch on the printer to the “Off” position:

     Printer Switch dsr/dtr:

---

Customizing Circulation Slips

Horizon comes with default circulation slips that your staff can print for borrowers and to help clarify your library’s work flow. You can also customize the appearance of a circulation slip and add a message to it. At each workstation, you choose which slips and receipts you want to print, and set up Horizon to recognize and control each printer.

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1. Open the circ_slip view in the Table Editor.
2. Do one of these options:

   - If your Epson printer is set to use Xon/Xoff, set the #3 DIP switch on your printer to the “On” position:

     Printer Switch Xon/Xoff:

   - If your Epson printer is set to use dsr/dtr, set the #3 DIP switch on the printer to the “Off” position:

     Printer Switch dsr/dtr:
Using Circulation Slips and Receipts

- Choose the circulation slip that you want to change, or create a new circulation slip.
- If you want to copy an existing circulation slip and modify it, do these steps:

  1. Click once on the slip you want to copy to highlight it.
  2. Choose File, Copy Record.

Horizon displays the Edit Circulation Slip window:

3. Choose the Circulation Slip Field that you want to change, or create a new one.

4. Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>This is a read-only field that displays the code for the circulation slip that you are editing.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the circulation slip. (For example, enter “due date slip”, “hold slip”, or “needs cataloging”.)</td>
</tr>
<tr>
<td>Location</td>
<td>Enter or choose the location for which you are setting up the slip.</td>
</tr>
</tbody>
</table>
| Section       | Mark the button to specify where you want this information to display:  
  • Header  
  • Body  
  • Footer  
  Information in a header or footer position prints once on each circulation slip. Information in a body position prints once for each item in the transaction. |
| Order         | Enter a number to specify the order in which this piece of information should display. |
### Customizing Circulation Slips

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Type</td>
<td>Enter or choose the field type code for the field that you are entering. You must use a predefined code. (For a list of codes and their descriptions, see “Using Field Type Codes” on page S-174.)</td>
</tr>
<tr>
<td>Label</td>
<td>Enter a label that describes the contents of the data element. (For example, enter “Item Barcode”.) This text prints on the circulation slip.</td>
</tr>
<tr>
<td>Column</td>
<td>If you want Horizon to retrieve information from a table, enter the name of the column from which the information comes. (For example, enter “name” to print the data from the “name” column of the borrower table.) If you leave this field blank or use a non-existent column name, no information prints. (For a list of tables and columns, see the Table Structures Guide.)</td>
</tr>
<tr>
<td>Data mask</td>
<td>Specifies how to mask or format the field data. For more information on masking, see “Masking Information on Patron Receipts” on page S-178.</td>
</tr>
<tr>
<td>Max. Len.</td>
<td>Enter the maximum field length for the data element. This is useful to make columns for payment or fee data, or to assure that a long title fits on the space provided. For slips, this is useful for hiding sensitive information (such as showing only one or two characters for a patron name) and for truncating long strings of data. For example, to show only the first character for the borrower’s first name, select the bfirstn option from the Circulation Slip Field drop-down list. Then, type 1 for the Max. Len. field.</td>
</tr>
</tbody>
</table>
Using Circulation Slips and Receipts

To specify how to display the borrower name, use the bfirstn, bmiddn, blastn, and btitln codes. You select these in the Field Type field by either typing the value or using the Codes button to select the appropriate value.

For example, if the string value of borrower first name is “Bob” and it is followed by the next field string of borrower last name with a value of “Smith”; if you set the Min. Len. to 20 on the bfirstn field from the Circulation Slip Field drop-down list; and if the string is right-justified, it prints as:

BobSmith.

NOTE
If you want a space between Bob and Smith, you need to insert a 1-space literal text field between them.

If the same string is left-justified, it prints as:

Bob Smith

This example pads 17 spaces (20 minus the number of characters in the specific name value) in front of “Bob”, while the second example pads 17 spaces after the name.

5 To specify how to display the borrower name, use the bfirstn, bmiddn, blastn, and btitln codes. You select these in the Field Type field by either typing the value or using the Codes button to select the appropriate value.

6 To format a date and time field, complete step 6 in “Formatting Date and Time on Receipts and Notices” on page S-184.

7 Save your changes.

8 If you want to create or edit a message for this circulation slip, continue with “Creating a Circulation Slip Message” on page S-177.

Using Field Type Codes

You use the circ_slip view to format the circulation slip content when you customize circulation slips. Use this table to complete the Field Type field in the circ_slip (Circulation Slip/Receipt) view:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Min. Len.</td>
<td>Enter the minimum character length for the field. This sets the padding for a field (using spaces for missing characters up to the minimum length) if the value is under the specified value, thus allowing you to format the slip so that columns line up correctly and everything is justified appropriately. For example, if the string value of borrower first name is “Bob” and it is followed by the next field string of borrower last name with a value of “Smith”; if you set the Min. Len. to 20 on the bfirstn field from the Circulation Slip Field drop-down list; and if the string is right-justified, it prints as: BobSmith.</td>
</tr>
<tr>
<td>Append to Previous</td>
<td>Mark this box if you want to keep this data element on the same line as the previous one.</td>
</tr>
<tr>
<td>Justify</td>
<td>Click the justification option you want to use.</td>
</tr>
<tr>
<td>addr</td>
<td>Specifies the borrower’s address. (Used for notices only)</td>
</tr>
<tr>
<td>baldue</td>
<td>The balance due on a cash receipt</td>
</tr>
<tr>
<td>Enter this code</td>
<td>To include this information</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>bbarcod</td>
<td>The borrower’s barcode if entered in the database</td>
</tr>
<tr>
<td>bemail</td>
<td>The borrower’s e-mail address if entered in the database</td>
</tr>
<tr>
<td>bfirstn</td>
<td>Specifies the borrower’s first name</td>
</tr>
<tr>
<td>blastn</td>
<td>Specifies the borrower’s surname</td>
</tr>
<tr>
<td>bmiddn</td>
<td>Specifies the borrower’s middle name</td>
</tr>
<tr>
<td></td>
<td>The borrower name fields are derived from the value in the Name field of the borrower record. The system assumes that the name is stored in a phone book type format when it parses the name into these new fields. The assumed format is the following: LastName&lt;comma&gt;&lt;space&gt;FirstName&lt;space&gt;MiddleName&lt;comma&gt;&lt;space&gt;Title</td>
</tr>
<tr>
<td></td>
<td>For example: “Sgt. John S. Doe” should be stored as “Doe, John S., Sgt.”</td>
</tr>
<tr>
<td>borradd</td>
<td>The borrower’s address if entered in the database</td>
</tr>
<tr>
<td>bphunum</td>
<td>The borrower’s phone number if entered in the database</td>
</tr>
<tr>
<td>btable</td>
<td>The borrower’s table data</td>
</tr>
<tr>
<td></td>
<td>The name of the desired column must be entered in the Column field of the circ_slip view to make this code valid.</td>
</tr>
<tr>
<td>btitln</td>
<td>Specifies the borrower’s title, such as Sgt. or Mrs.</td>
</tr>
<tr>
<td>cshdrid</td>
<td>The cash drawer ID for a cash receipt</td>
</tr>
<tr>
<td></td>
<td>The ID prints only if it has been entered in the Change Workstation ID option on the Horizon File menu.</td>
</tr>
<tr>
<td>date</td>
<td>The workstation date and time</td>
</tr>
<tr>
<td>deptid</td>
<td>The department ID if it has been entered in the Change Workstation ID option on the File menu</td>
</tr>
<tr>
<td>duedate</td>
<td>The due date on the CKO and CKI slips according to ITYPE and BTYPE</td>
</tr>
<tr>
<td>duetime</td>
<td>The time that an item is due on the CKO and CKI slips according to ITYPE and BTYPE. This displays only if a due time is defined.</td>
</tr>
<tr>
<td>escape</td>
<td>The printer escape sequence</td>
</tr>
<tr>
<td></td>
<td>(For the specific codes for your printer, see your printer’s documentation.)</td>
</tr>
<tr>
<td>feeAmt</td>
<td>The fee amount for cash receipts</td>
</tr>
<tr>
<td>feecat</td>
<td>The fee category for cash receipts, such as overdue fines</td>
</tr>
<tr>
<td>feedate</td>
<td>The fee date for cash receipts</td>
</tr>
<tr>
<td>Enter this code</td>
<td>To include this information</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>feescr</td>
<td>The fee description for cash receipts</td>
</tr>
</tbody>
</table>
| frmcut          | The escape sequence to cut paper for printers that have the automatic cutting option  
                 (For the specific codes for your printer, see your printer’s documentation.)  
                 This code should be the last field you enter in the Circulation Slip Field group. |
| frmfeed         | The escape sequence for form feed  
                 (For the specific codes for your printer, see your printer’s documentation.)  
                 You may need to adjust the number of form feeds to get your receipts to print and cut off at the position you want. |
| gaddr           | Specifies the Parent / Guardian name, borrower name, and address. (Used for notices only) |
| guard           | Specifies the Parent / Guardian name for the borrower. (Used for notices only) |
| hbborr          | The borrower receives Home Service  
                 (For more information, see the Home Service Guide.) |
| hbroute         | The Home Service route used to deliver items to customers  
                 (For more information, see the Home Service Guide.) |
| itable          | The item table data  
                 The name of the desired column must be entered in the circ_slip Column field to make this code valid. |
| itemsg          | The item message on CKO and CKI slips  
                 This message is linked to the location and ITYPE in the circ_slip_msg (Circ Slip Messages) view. |
| linfeed         | The escape sequence for the line feed (for example, ALT+10)  
                 (For the specific codes for your printer, see your printer’s documentation.) |
| literal         | A literal text field so that you can enter anything you want |
| locseqn         | Specifies local sequential numbering (only available for payment and waiver receipts). The number is unique to each agency and is assigned by the system. A global number for all agencies in a consortium is also assigned (seqnum code) that you can use on the payment or waiver receipt. |
### Customizing Circulation Slips

#### Creating a Circulation Slip Message

You can create or edit a message that you want to print on a circulation slip.

**To create a circulation slip message**

1. Open the *circ_slip_msg* view in the Table Editor.
2. Choose the circulation slip message that you want to change, or create a new message.
   Horizon displays the Edit Circ Slip Messages window:

<table>
<thead>
<tr>
<th>Enter this code</th>
<th>To include this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>ltable</td>
<td>The location table data</td>
</tr>
<tr>
<td></td>
<td>The name of the desired column must be entered in the circ_slip Column field to make this code valid.</td>
</tr>
<tr>
<td>payamt</td>
<td>The pay amount for cash receipts</td>
</tr>
<tr>
<td>paycat</td>
<td>The pay category for cash receipts, such as check or cash</td>
</tr>
<tr>
<td>seqnum</td>
<td>Whether you want Horizon to assign sequential numbers to one or all types of slips, such as cash receipts</td>
</tr>
<tr>
<td>title</td>
<td>The title of an item</td>
</tr>
<tr>
<td>totcko</td>
<td>The total number of items checked out on CKO and CKI slips</td>
</tr>
<tr>
<td>transfr</td>
<td>On a transit workslip, the location where a transit item was checked in</td>
</tr>
<tr>
<td>transto</td>
<td>On a transit workslip, the owning location of a transit item</td>
</tr>
<tr>
<td>wkstid</td>
<td>The workstation ID if it has been entered in the Change Workstation ID option on the Horizon File menu</td>
</tr>
</tbody>
</table>
Using Circulation Slips and Receipts

3 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circulation Slip</td>
<td>Enter or choose the code for the type of slip for which you are adding a message.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter or choose the code of the location for which you are setting up the message.</td>
</tr>
<tr>
<td>ITYPE</td>
<td>Enter or choose the code of the ITYPE for which you are setting up the message.</td>
</tr>
<tr>
<td>Message</td>
<td>Enter the message that you want to print on the slip type for the ITYPE and location that you specified.</td>
</tr>
</tbody>
</table>

4 Save your changes.

Masking Information on Patron Receipts

Certain borrower information (such as the borrower name and barcode) can now be masked on patron receipts so that it is obscured. This is useful if you want to keep patron IDs or other information secure or hidden. For example, you can mask a 14-digit ID so that only the final 4 digits display, or so that asterisks display for the first 10 digits and the final 4 digits display normally.

To mask a field on a patron receipt

1 Open the Horizon client and log in.
2 Go to Administration > Table Editor.
3 Select the circ_slip table, and then click OK.
4 Select the Circulation Slip that has the information that you want to mask, and then click Edit.
   For example, select the payment circulation slip.
5 In the Circulation Slip Field drop-down list, select the field that you want to mask.
   For example, select the Borrower bar code field option.
6 In the Data mask field, type any number of characters or symbols to use for the mask.
   For example, if the borrower barcode is 14 characters and you want to only display the last 4 characters, type 10 asterisks (*). If the Label field value for the specified field option is set as “Barcode#”, the patron receipt may look something like this:
   Barcode#*********0018
7 You can also mask data by using the Max. Len. field to set the number of characters to display.
   For example, you can set the borrower first name field option to have a maximum length of 2 so that it only shows the first two letters of the first name.
8 Click Save to save your settings, and then click Close to close the window.
Printing Request Table Information

Request table information can be included on any circulation slip. This is useful for including information like the hold expiration date.

To include the request table information

1. Open the Horizon client and log in.
2. Go to Administration > Table Editor.
3. Select the circ_slip table, and then click OK.
4. Select the Circulation Slip that you want to print request table information on, and then click Edit.
   For example, select the hold circulation slip.
5. In the Circulation Slip Field area, click the New button.
   For the new field, complete the information as normal.
6. For the Field Type field, select or type the rtable code.
7. In the Column field, type any one of the request table columns that you want to display.
   For example, type the hold_exp_date column to include the hold expiration date.
8. Repeat steps 5-8 to include additional columnar data from the request table.
9. Click Save to save your settings, and then click Close to close the window.

Using Workstation Receipts

You use workstation receipt options to determine whether a workstation can print slips and receipts, and which kinds of slips and receipts can print from that workstation. Workstation receipt options also let you define your receipt printer functions. You must choose receipt options for each workstation that you want to use to print slips and receipts.

Once you set Horizon to allow printing and choose the slips and receipts you want it to print, Horizon prints all receipts automatically except group checkin or group checkout receipts. Staff can use the menu bar or hot key combinations to print group receipts.

You may want to print all types of slips at a particular workstation or you may want to print only one or two types.

For example, you may want to have a specific workstation set aside for payment and refund receipts only. At this workstation, you would choose to print only those two types of receipts. You may also choose to not allow printing of payment and refund receipts at all other workstations.

This section explains these topics:

- Understanding Borrower Receipts and Slips
- Understanding Workslips
**Understanding Borrower Receipts and Slips**

If you have your workstation set up to print receipts and slips, Horizon can print receipts for borrowers in one of two ways:

- Automatically when a library transaction is completed.
- Manually when a borrower requests a receipt.

Here is an example of a borrower due date slip:

For all receipts and slips, you can either use the default, edit the default to meet your needs, or create a new receipt by copying and modifying an existing one.

You can print these types of receipts:

- **Due Date slip.** This is a single-item receipt that lists one item checked out and its due date. This receipt is printed individually at checkout as each barcode is entered.
- **Multiple Due date slip.** This is a multiple-item receipt that lists all items checked out, their due dates, and the total number of items checked out to a borrower for the current transaction. This receipt is manually printed at checkout after scanning in the last barcode.
- **Single Checkin Receipt.** This is a single-item receipt that lists one item checked in and the date. This receipt is printed individually at checkin as each barcode is entered.
- **Renewal Receipt.** This is a multiple-item receipt that lists all of the items a borrower renewed, the new due date, and the total number of items renewed.
- **Patron Payment Receipt.** This is a receipt that lists the amount a borrower paid for an overdue item or other library fee.
- **Patron Refund Receipt.** This is a receipt that lists the amount a borrower was refunded.
Understanding Workslips

Horizon can automatically print workslips when an item with a specific status is checked in. These workslips notify staff that the item needs special attention. Here is an example of a staff workslip:

These are the workslips you can print:

- **Hold Slip.** Notifies staff that the item has been requested and needs to be placed on the hold shelf. (The barcode, phone number, and e-mail address of the borrower who made the request is also printed on the default slip.)
- **In Transit Slip.** Notifies staff that the item needs to be sent to the library specified.
- **Needs Cataloging.** Notifies staff that the item needs to be cataloged.

Using Printer Escape Sequences

When you define a receipt printer in Horizon, you choose whether to use Windows or direct port printing. If you use Windows printing, you may need to configure your printer in Windows. (For instructions, see your Windows user’s guide.) If you use port printing, you can further refine your printer output by using commands called “escape sequences.” Escape sequences let you set and reset printing options. You can use prefix and suffix escape sequences.

You use the prefix escape sequence to change printer settings before the printing of a slip or receipt. With prefix escape sequences, you can do one or more of these things:

- Set the printer to retract the paper before it begins printing.
- Change the default printer font for printing slips.
- Change the form length and width for printing slips. (This is useful when the printer is not a dedicated slip printer.)

You use the suffix escape sequence to reset the printer after the printing of a slip or receipt. With suffix escape sequences, you can do one or more of these things:

- Set the printer to advance the paper to a suitable “tear off” point after printing.
- Change back to the default printer font after printing slips or receipts.
- Change back to the default form length and width after printing slips or receipts.

For example, by using escape sequences, the printer can advance the paper after it finishes printing to a point where the slip or receipt can be torn off easily. When the next receipt or slip is printed, the printer can retract the paper to the appropriate position to begin printing. (For more information about the escape sequences for your specific printer, refer to your printer’s documentation.)
Setting Workstation Receipt Options

You set workstation receipt options at each workstation. These include options for borrower receipts, borrower slips, and printer escape sequences.

To set workstation receipt options

1. Start the Open CKI Window or Open CKO Window process.
   The default location of these processes is the Circulation folder on the navigation bar.
2. Choose Tools, Change Receipt Options.
   Horizon displays the Workstation Receipt Options window:
3 Use this table as a guide in setting Workstation Receipt Options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Printing of Slips and Receipts</td>
<td>If you want to print slips and receipts from this workstation, mark this box.</td>
</tr>
<tr>
<td>Print Automatically group</td>
<td>Mark the types of receipts in this group that you want to print automatically from this workstation. You can mark more than one:</td>
</tr>
<tr>
<td></td>
<td>• Due date slip                                                                  If you mark Due date slip and you want to manually print a slip that contains all of a single borrower’s transactions, mark the Multiple box.</td>
</tr>
<tr>
<td></td>
<td>• Renewal receipt                                                               • Patron payment receipt</td>
</tr>
<tr>
<td></td>
<td>• Patron refund receipt                                                          • Single checkin receipt</td>
</tr>
<tr>
<td></td>
<td>• Hold slip                                                                     • In transit slip</td>
</tr>
<tr>
<td></td>
<td>• Needs cataloging                                                               • Needs cataloging</td>
</tr>
<tr>
<td>Windows Printing</td>
<td>If you want to use the Windows Printer Setup for a networked printer, mark this box. Then click Setup to set up the printer. Marking this box disables the Port Printing setup.</td>
</tr>
<tr>
<td>Port Printing</td>
<td>If you want to use port printing, mark the port the printer uses.</td>
</tr>
<tr>
<td>Prefix Escape Sequence</td>
<td>Enter the prefix escape sequence for your printer. (For the specific codes for your printer, see your printer’s documentation.)</td>
</tr>
<tr>
<td>Line Feed Escape Sequence</td>
<td>Enter the line feed escape sequence for your printer. (For the specific codes for your printer, see your printer’s documentation.) Here are two examples of line feed escape sequences:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Printer</th>
<th>Escape Sequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Epson printer</td>
<td>/10</td>
</tr>
<tr>
<td>Omni printer</td>
<td>/10 /13</td>
</tr>
</tbody>
</table>
Formatting Date and Time on Receipts and Notices

Horizon 7.4.1 and later versions allow you to set the date and time field to display the way that you want.

You format the date and time using the Data mask field, but it only specifies how to display the information; it does not hide it.

**To set up formatting for the date and time**

1. Open the Horizon client and log in.
2. Go to Administration > Table Editor.
3. Select the circ_slip table, and then click OK.
4. Select the **Circulation Slip** that has the date or time field that you want to format, and then click Edit.
   
   For example, select the **payment** circulation slip.
5. In the **Circulation Slip Field** drop-down list, select the **Date and Time** field to format.
6. In the **Data mask** field, type the codes for the date or time formatting that you want to display. For example, to display the month abbreviation, type **MMM**.

---

**In this field** | **Do this**
---|---
Form Feed Escape Sequence | Enter the form feed escape sequence for your printer. *(For the specific codes for your printer, see your printer’s documentation.)* Here are two examples of form feed escape sequences:
<table>
<thead>
<tr>
<th><strong>Printer</strong></th>
<th><strong>Escape Sequence</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Epson printer</td>
<td>/12</td>
</tr>
<tr>
<td>Omni printer</td>
<td>/12</td>
</tr>
</tbody>
</table>

Cut Paper Escape Sequence | Enter the cut paper escape sequence code. *(For example, for many Epson printers, you could enter “/27, /105”.) *(For the specific codes for your printer, see your printer’s documentation.)* Omni printers and some Epson printers do not have a cut paper option.

Suffix Escape Sequence | Enter the suffix escape sequence for your printer. *(For the specific codes for your printer, see your printer’s documentation.)*

Replacement Character (hex) | Enter the character you want to be printed in place of any non-printable characters.

---

4. Click OK to save your changes.

---
To include literal values such as commas, slashes, or dashes, you must include single quotes around the literal text. For example, to include a comma, type ‘,’ as part of the data mask.

Note

If you want a space in the date or time format, type a space between the necessary elements; you do not need to quote them.

You can use any of these formatting codes for the date:

<table>
<thead>
<tr>
<th>Enter this code</th>
<th>To include this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>d</td>
<td>Specifies to display the day of the month as digits with no leading zero for any single-digit days. For example, “7”.</td>
</tr>
<tr>
<td>dd</td>
<td>Specifies to display the day of the month as digits with a leading zero for any single-digit days. For example, “07”.</td>
</tr>
<tr>
<td>ddd</td>
<td>Specifies to display the 3-letter abbreviation for the day of the week. For example, “Wed”.</td>
</tr>
<tr>
<td>dddd</td>
<td>Specifies to display the full name of the day of the week. For example, “Wednesday”.</td>
</tr>
<tr>
<td>M</td>
<td>Specifies to display the month as digits with no leading zero for any single-digit months. For example, “2” for February.</td>
</tr>
<tr>
<td>MM</td>
<td>Specifies to display the month as digits with a leading zero for any single-digit months. For example, “02” for February.</td>
</tr>
<tr>
<td>MMM</td>
<td>Specifies to display the 3-letter abbreviation for the month. For example, “Feb”.</td>
</tr>
<tr>
<td>MMMM</td>
<td>Specifies to display the full name of the month. For example, “February”.</td>
</tr>
<tr>
<td>y</td>
<td>Specifies to display the last two digits of the year with no leading zero for any years less than 10. For example, “8” for 2008.</td>
</tr>
<tr>
<td>yy</td>
<td>Specifies to display the last two digits of the year with a leading zero for any years less than 10. For example, “08” for 2008.</td>
</tr>
</tbody>
</table>
For example, to get the date string “Wed, Aug 31 1994”, type `ddd', MMM dd yyyy` in the Data mask field.

You can use any of these formatting codes for the time:

<table>
<thead>
<tr>
<th>Enter this code</th>
<th>To include this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>yyyy</td>
<td>Specifies to display all the digits for the year. For the Thai Buddhist and Korean calendars that use 5-digit years, you can use this pattern or add another “y” to explicitly specify 5-digit years. However, this 4-digit pattern does show five digits for these two calendars and four digits for all other supported calendars. For example, “2008”.</td>
</tr>
<tr>
<td>gg</td>
<td>Specifies to display the period or era string. This element is ignored if the date to be formatted does not have an associated era or period string.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enter this code</th>
<th>To include this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>h</td>
<td>Specifies to display the hour with no leading zero for any single-digit hours--based on a 12-hour clock. For example, “2” for 2:00 pm.</td>
</tr>
<tr>
<td>hh</td>
<td>Specifies to display the hour with a leading zero for any single-digit hours--based on a 12-hour clock. For example, “02” for 2:00 pm.</td>
</tr>
<tr>
<td>H</td>
<td>Specifies to display the hour with no leading zero for any single-digit hours--based on a 24-hour clock. For example, “8” for 8:00 am and “14” for 2:00 pm.</td>
</tr>
<tr>
<td>HH</td>
<td>Specifies to display the hour with a leading zero for any single-digit hours--based on a 24-hour clock. For example, “08” for 8:00 am.</td>
</tr>
<tr>
<td>m</td>
<td>Specifies to display the minutes with no leading zero for any single-digit minutes. For example, “5” for 5 minutes after the hour.</td>
</tr>
<tr>
<td>mm</td>
<td>Specifies to display the minutes with a leading zero for any single-digit minutes. For example, “05” for 5 minutes after the hour.</td>
</tr>
</tbody>
</table>
Using Workstation Receipts

<table>
<thead>
<tr>
<th>Enter this code</th>
<th>To include this information</th>
</tr>
</thead>
<tbody>
<tr>
<td>s</td>
<td>Specifies to display the seconds with no leading zero for any single-digit seconds. For example, “5”.</td>
</tr>
<tr>
<td>ss</td>
<td>Specifies to display the seconds with a leading zero for any single-digit seconds. For example, “05”.</td>
</tr>
<tr>
<td>t</td>
<td>Specifies to display a 1-character time marker string, such as “A” or “P” for AM or PM.</td>
</tr>
<tr>
<td>tt</td>
<td>Specifies to display a 2-character time marker string, such as “AM” or “PM”.</td>
</tr>
</tbody>
</table>

For example, to get the time string “11:29:40 PM”, you type `hh':'mm':'ss tt` in the Data mask field.

**Note**

You cannot combine the date and time formatting codes in the same field. However, you can put them in two different fields and then place them next to each other on the receipt or notice.

7. Click **Save** to save your settings, and then click **Close** to close the window.
Changing Circulation Display Options

You can change some display options in the Circulation processes by marking fields in the location view. To change other display options, you need to add columns to tables.

This section explains these topics:

- Changing Borrower Display Options for a Location
- Adding Borrower Number or Expiration Date to the CKO Screen
- Displaying Additional Borrower Information in Checkout

Changing Borrower Display Options for a Location

During checkout, when a staff member clicks the All Items Out button on a borrower record, Horizon displays a list of items that the borrower has checked out. You can choose whether Horizon displays all the items the borrower has checked out, or whether Horizon does not display items that the borrower has claimed returned or declared lost. This lets you keep a record of the most recent borrower to have checked out an item with a “Lost” or “Claimed Returned” status without counting those items as currently checked out to that borrower.

When you choose not to display claimed returned or lost items for a borrower, Horizon does these things:

- No longer counts the undisplayed items as items that the borrower has on loan
- Maintains the link between borrowers and the items with “Claimed Returned” or “Lost” status through the burb table
- Maintains the listing of the items in Current Blocks

You can also choose to add the borrower’s barcode to the Checkout window, and to add the borrower name to a damaged checkin display.
To change Circulation display options in the location view

1. Open the location view in the Table Editor.
2. Display these fields:

Choose one of these options to affect a borrower’s All Items Out display.

<table>
<thead>
<tr>
<th>To do this</th>
<th>Mark this Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display all the items that borrowers have checked out</td>
<td>All Items Out</td>
</tr>
<tr>
<td>Hide any items that borrowers have claimed returned or that your library has declared lost</td>
<td>Suppress ‘cr’ and ‘l’ items</td>
</tr>
<tr>
<td>Hide any items that your library has declared lost</td>
<td>Suppress ‘l’ items</td>
</tr>
<tr>
<td>Hide any items borrowers have claimed returned</td>
<td>Suppress ‘cr’ items</td>
</tr>
</tbody>
</table>

When you hide items, Horizon no longer counts them as items that the borrower has on loan. However, Horizon does maintain the link between borrowers and the items with “claimed return” or “lost” status through the burb table. These items also remain listed in Current Blocks.
4  Display these fields:

   ![Diagram of Circulation Setup Guide](image)

   Use these fields to change other Circulation display options.

5  Do one or both of these options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Borr. barcode on CKO window?</strong></td>
<td>If you want to display the borrower’s barcode on the Checkout window, mark this box.</td>
</tr>
<tr>
<td><strong>Damaged-Cki Show Borrower</strong></td>
<td>If you want to display the name of the borrower who had checked out an item that you are checking in using the Damaged Checkin mode, mark this box. Marking this option displays borrower names when you use Damaged Checkin regardless of whether you choose to display borrower names during other checkin modes.</td>
</tr>
</tbody>
</table>

---

**Adding Borrower Number or Expiration Date to the CKO Screen**

In Horizon 7.4.2 or later versions, you can add the borrower # or expiration date to the CKO screen, similar to the borrower name and alternate ID.

**To customize the CKO screen**

1  Open the Horizon client and log in.
2  Go to Administration > Table Editor.
3  Select the location table, and then click OK.
4  Select the location for which you want to customize the CKO screen, and then click Edit.
5  Click Page Down until you get to the Line two of CKO window field.
Displaying Additional Borrower Information in Checkout

By default, Horizon displays the borrower name and ID number when you locate a borrower record in Checkout. You can set up Horizon to let your staff see additional borrower information. Displaying additional borrower information can help library staff more quickly and easily differentiate between two borrowers with the same name.

You can display information from any of the columns specified in the borrower_search SQL view, including these:

<table>
<thead>
<tr>
<th>Table</th>
<th>Column names</th>
</tr>
</thead>
<tbody>
<tr>
<td>borrower</td>
<td>borrower#</td>
</tr>
<tr>
<td></td>
<td>second_id</td>
</tr>
<tr>
<td></td>
<td>location</td>
</tr>
<tr>
<td></td>
<td>btype</td>
</tr>
<tr>
<td></td>
<td>reconst</td>
</tr>
<tr>
<td></td>
<td>backlink</td>
</tr>
<tr>
<td></td>
<td>source</td>
</tr>
<tr>
<td></td>
<td>last_cko_date</td>
</tr>
<tr>
<td></td>
<td>n_ckos</td>
</tr>
<tr>
<td></td>
<td>creation_date</td>
</tr>
<tr>
<td></td>
<td>registration_date</td>
</tr>
<tr>
<td></td>
<td>expiration_date</td>
</tr>
<tr>
<td></td>
<td>last_update_date</td>
</tr>
<tr>
<td></td>
<td>birth_date</td>
</tr>
<tr>
<td></td>
<td>borrower_note</td>
</tr>
<tr>
<td></td>
<td>language</td>
</tr>
<tr>
<td></td>
<td>pin#</td>
</tr>
<tr>
<td></td>
<td>last_authentication_date</td>
</tr>
<tr>
<td>borrower_address</td>
<td>address_type</td>
</tr>
<tr>
<td></td>
<td>mail_sort_type</td>
</tr>
<tr>
<td></td>
<td>send_notice_by</td>
</tr>
<tr>
<td></td>
<td>valid_from_date</td>
</tr>
<tr>
<td></td>
<td>valid_to_date</td>
</tr>
<tr>
<td></td>
<td>address1</td>
</tr>
<tr>
<td></td>
<td>address2</td>
</tr>
<tr>
<td></td>
<td>address3</td>
</tr>
<tr>
<td></td>
<td>address4</td>
</tr>
<tr>
<td></td>
<td>postal_code</td>
</tr>
<tr>
<td></td>
<td>city_st</td>
</tr>
<tr>
<td></td>
<td>email_name</td>
</tr>
<tr>
<td></td>
<td>email_address</td>
</tr>
<tr>
<td>borrower_phone</td>
<td>phone_no</td>
</tr>
<tr>
<td></td>
<td>phone_type</td>
</tr>
</tbody>
</table>

To display additional borrower information in Checkout

1. Open the mq_view view in the Table Editor, or start the View Control process.
   The default location of this process is the Administration\System Setup folder on the navigation bar.
   Horizon opens the List Search window.
Setting Up Time Periods for Gathering Bib Usage Statistics

You can set up Horizon to let library staff view usage statistics for individual bib records. Horizon collects these statistics:

- First time checkouts
- Renewals
- Telephone renewals
- In-house use

Horizon collects statistics based on the circulating location. Horizon stores the statistics for five years after the year when statistics are collected. (For example, if Horizon collects statistics for 2003, Horizon keeps the statistics until 2008.) When a bib or item record is deleted, its statistics stay in the system until the five years pass. You can view the statistics from the Send To menu. (For more information, see “Viewing Circulation Statistics by Bib Record” in the “Reports” chapter of the Circulation Guide.)

Constraints

- You must set up the time periods that you want Horizon to use when gathering the statistics. If you do not set up time periods, Horizon does not collect statistics.
- You cannot set up multiple time periods to run simultaneously. If you collect monthly statistics and want to see a yearly total, you must use SQL to combine the counts.
- This feature is not retroactive: Horizon cannot collect statistics for previous time periods. The time periods you set up must begin on the day you set them up or on a future date.
- You cannot enter a specific start date more than once; the date must be unique.

To set up time periods for gathering bib record usage statistics

1 Start the Setup Usage Statistics Periods process.

   The default location of this process is the Circulation \ Circulation Control Menu folder on the navigation bar.
Horizon displays the Usage Statistics Periods Setup grid:

2  Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
<td>This is a read-only field where Horizon automatically displays the sequence in which you created the period when you save your changes.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Enter the date that you want Horizon to start collecting statistics. This date must be the date when you set up the period or a future date when you want to begin gathering statistics. The start date of the next period you enter becomes the end date of the time period you are setting up. A period stays active until you set up a new period and its start date is reached.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the period.</td>
</tr>
</tbody>
</table>

3  Choose File, Save.
Horizon displays the time period number and your entries.
Sharing Borrower Information in a Consortium

Library consortia sometimes want to allow borrowers with accounts at one consortium library to use items held at another consortium library. Horizon offers two methods for libraries that are part of the same consortium to maintain common borrower information:

- **Shared Borrower database.** This method works when several libraries use a single borrower database.
- **Synchronizing borrower data.** This method works for libraries that maintain separate borrower databases, but want to coordinate information in the databases.

Both methods let borrowers who have borrower rights at one consortium library check out items from any other consortium library without having to register at each separate library.

This section explains these topics:

- Understanding Shared Borrower Databases
- Synchronizing Borrower Data

---

**Understanding Shared Borrower Databases**

If your library is a member of a consortium, the member libraries may share borrower information from a single shared database rather than copying borrower information to the local database of each library. The Shared Borrower database resides on a single server to which all consortium libraries connect. You can share a borrower database only if each member library’s bibliographic database resides on the same server as the Shared Borrower database. However, each library’s bibliographic database can be maintained separately.

**NOTE**

To set up a Shared Borrower database, contact your Horizon implementation team.

During Shared Borrower setup, the consortium determines the parameters for the shared BTYPE, including its name. The shared BTYPE settings establish circulation rules for borrowers who check out items from member libraries other than the library they use most often. Once Shared Borrower databases are set up, Horizon automatically assigns a shared BTYPE to each borrower record created by any member library.
Here is an example of a Shared Borrower borrower record:

![Edit New Borrower](image)

This consortium named its shared BTYPE “Guest.”

In addition to the shared BTYPE, each borrower record includes a Local BTYPE group. The library that the borrower uses most often can create a local BTYPE that establishes general circulation rules for that BTYPE for their library. These local BTYPE rules override the shared BTYPE rules.

For example, if the shared BTYPE gives a three-day checkout period but you want to let out-of-area borrowers check out items for a full week, you can override the circulation parameters defined by the shared BTYPE. You do this by creating and assigning a local BTYPE of your own that sets the checkout period for seven days for the shared BTYPE. (For more information, see “Defining a Borrower Circulation Type (BTYPE)” on page S-25. For more information on adding new borrowers, see “Adding a New Borrower to a Shared Borrower Database” in the “Borrower and Item Records” chapter of the Circulation Guide.)

Synchronizing Borrower Data

If your library is a member of a consortium whose borrower databases are hosted on separate servers, you can synchronize the borrower data on those servers automatically. When you synchronize borrower data, the records of all borrowers are kept current at each library on an ongoing basis. (If your consortium shares a single borrower database, you do not need to synchronize borrower data. You can use a Shared Borrower database instead. For more information, see “Understanding Shared Borrower Databases” on page S-194.)

Horizon uses a program called Synchro to let libraries synchronize borrower data across databases—and even across servers. Synchro reads borrower data from one server and duplicates it on a second server. You can synchronize data for an entire consortium from one station, or you can run each instance of Synchro from a different computer.

Use these guidelines when synchronizing data:

- The computer you use to run Synchro must be networked with all the databases it synchronizes.
- You must run two separate instances of Synchro (one in each direction) for each pair of libraries that want their data synchronized. This synchronizes borrower information in both libraries’ databases.
Members of the library consortium must decide which member library is responsible for running Synchro. This will avoid duplication of effort while making sure each interested library has the updated records it needs.

Each server must use unique borrower numbers.

Here is an example of how synchronization works:

In this example, the Main Library, the University Library, and the Medical Library each maintains its own database. However, borrowers need to be able to check out items at all three locations. New borrower information and changes to existing borrower information need to be synchronized between the three databases.

Each instance of Synchro reads one local queue of borrower record additions, updates, and deletions, and duplicates those additions, updates, and deletions on one remote database. You need to run an instance of Synchro that reads data from the Main Library and writes it to the University Library, and another instance that reads data from the University Library and writes it to the Main Library, to synchronize these two databases. You need to run a third instance of Synchro that reads data from the Main Library and writes it to the Medical Library and another instance that reads data from the Medical Library and writes it to the Main Library to synchronize these two databases, and so on.

This section explains these topics:

- Setting Up Borrower Data Synchronization
- Setting Synchro to Start Automatically
Setting Up Borrower Data Synchronization

The first step in setting up synchronization is to set up views in Horizon.

Before You Begin

- You must work with other members of your library consortium to decide which institution is responsible for running Synchro. This will avoid duplication of effort while making sure each interested library has the updated records it needs.
- Each server must use unique borrower numbers. The newkey setting for borrower on one of the databases should be much larger than the value of the other database. (For more information, contact your Horizon implementation team.)

**IMPORTANT**

If you want to synchronize servers that do not have unique numbers, contact your Horizon salesperson regarding a customized partial data migration.

- If you have not already done so, set up a computer that has network access to any consortium member libraries that want to synchronize their borrower information. Use the computer that has network access for all steps in this task. (You may want to use the same computer you use to run Day End processes.)

To set up borrower data synchronization

1. Open the `sync_server_db` view in the Table Editor.
2. Set up the `sync_server_db` view for the remote server/database. (For instructions, contact your Horizon implementation team.)
3. Set up the appropriate views in the `sync_table` view in the Table Editor with the remote server/database code. (For instructions, contact your Horizon implementation team.)
4. Configure the Synchro program for automatic startup whenever you boot the computer it runs on. (For instructions, see “Setting Synchro to Start Automatically” on page S-198.)
5. Repeat steps 1 through 4 for each pair of consortium member libraries that want to synchronize their borrower databases.

**IMPORTANT**

When you set up a pair of databases, make sure you remember which database of the pair is designated as the remote database in the Table Editor.
Setting Synchro to Start Automatically

You set up Synchro to start automatically by placing a Synchro shortcut in the Windows Startup folder. When you do this, you first create a shortcut defining the Synchro parameters, and then copy this shortcut into the Windows Startup folder.

To set Synchro to start automatically

1. Create a shortcut to the Synchro.exe program.
   (For instructions, see your Windows user guide.)
   The default location of this program is your Horizon installation folder.
2. Right-click the Synchro.exe shortcut icon on your desktop.
3. Choose Properties.
   Windows displays the Shortcut to Synchro.exe Properties window.
4. Click the Shortcut tab.
   Windows displays the Shortcut to Synchro.exe information.
5. Click in the Target field to leave the existing text in place.
6. After the existing text, add Synchro parameters in this format (be sure to put a space before each forward slash):
   `/s server /p password /u user /d database /r remotedb /o remotepassword /v remoteuser`
   These are the sample variables represented in the path:

<table>
<thead>
<tr>
<th>Switch</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>/s server</td>
<td>Specifies the server name where Synchro logs on.</td>
</tr>
<tr>
<td>/p password</td>
<td>Specifies the password required to log on to the database.</td>
</tr>
<tr>
<td>/u user</td>
<td>Specifies the user name or ID required to log on to the database.</td>
</tr>
<tr>
<td>/d database</td>
<td>Specifies the local database whose changes Synchro reads.</td>
</tr>
<tr>
<td>/r remotedb</td>
<td>Specifies the remote database to synchronize.</td>
</tr>
<tr>
<td>/o remotepassword</td>
<td>Specifies the password required to log on to the remote database.</td>
</tr>
<tr>
<td>/v remoteuser</td>
<td>Specifies the user name or ID required to log on to the remote database.</td>
</tr>
</tbody>
</table>

For example, enter these parameters to synchronize the local database “main” with the remote database “newman”:
`/skuni /p123456 /uadmin /dmain /rnewman /ou62ch4 /vadmin`

7. Repeat steps 1 through 6, reversing the /d and /r database definitions.
   This creates a second shortcut that will synchronize data in the opposite direction.
   For example, enter these parameters to synchronize the “newman” database with the “main” database:
8 Place all the Synchro shortcuts you created in the Windows Startup folder. (For instructions, see your Windows user’s guide.)

9 Shut down the workstation.

10 Restart the workstation.

Synchro runs continuously in the background to keep the borrower databases synchronized.

NOTE

Synchro must run in both directions (from the first server to the second server, and then from the second server to the first server). This synchronizes data from each database with the other database. If you run Synchro in only one direction, only one database will contain all the current information about borrowers.

NOTE

If the workstation running Synchro is shut down for any reason, Synchro will start again as soon as the station is restarted.
Setting Up Homerooms for Borrowers

If you are a school library, you can set up homeroom codes (representing a teacher’s name or room number) to assign to each borrower. This lets your staff know the homeroom of each borrower.

In order to assign a homeroom code to each borrower, you first need to add the homeroom column to the borrower view in the Table Editor. The name you give this column displays in the Edit Borrower window, where circulation staff can then assign a homeroom code to a borrower.

This section explains these topics:

- Displaying the Homeroom Administration Process
- Creating Homeroom Codes
- Adding the Homeroom Column to the Borrower View

Displaying the Homeroom Administration Process

The Homeroom Administration process lets you create homeroom codes. By default, this process does not display on the navigation bar. You need to display the Homeroom Administration process on the navigation bar before you can use it.

To display the Homeroom Administration process

1. Open the Customize Launcher window.
2. Click the Navigation Bar tab.
3. In the model navigation bar, highlight the Homeroom Administration process.
   The default location of this process is the Administration folder in the model navigation bar.
4. Unmark the Hide Menu box.
5. Save your changes.
   Horizon now displays the Homeroom Administration process in the Administration folder on the navigation bar.
Creating Homeroom Codes

The Homeroom Administration process lets you access a grid where you can set up all of your homeroom codes. (For more information on using grids, see “Working with Grids and Forms” in the “Horizon User Interface” chapter of the Horizon Basics Guide.)

To create homeroom codes

1. Start the Homeroom Administration process.
   The default location of this process is the Administration folder in the navigation bar. If this process does not display in the navigation bar, you need to display it. (For instructions, see “Displaying the Homeroom Administration Process” on page S-200.) Horizon displays the Homeroom Administration grid.
2. In the Homeroom field, enter a code for the homeroom.
3. In the Description field, enter a description for the homeroom.
4. Save your changes.
5. Repeat steps 2 through 4 to create additional homeroom codes.

Adding the Homeroom Column to the Borrower View

You must add the homeroom column to the borrower view so that the borrower’s homeroom displays when you open the Edit Borrower window in Circulation. Once you add this column to the borrower view, staff can view or change the borrower’s assigned homeroom in the Edit Borrower window. (For more information, see “Adding a Column to a Search List View or Edit Window” in the “Reconfiguring List and Edit Windows” section of the “Introduction to Horizon Views” chapter of the System Administration Guide.)

To add the homeroom column to the borrower view

1. In the Table Editor, open the borrower view.
2. Click Page Down or resize the window to display the Edit View group.
3. Click New.
4. Complete these fields in the Edit View group:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column Name</td>
<td>Enter “homeroom”. This is the name of the database column on which the field in the Edit Borrower window is based.</td>
</tr>
<tr>
<td>Ord</td>
<td>Enter the order number in which the field should display on the Edit Borrower window.</td>
</tr>
<tr>
<td>Column Label</td>
<td>Enter the name of the field on the Edit Borrower window. (For example, you may want to label the field “Borrower’s Homeroom”.)</td>
</tr>
</tbody>
</table>
Setting Up the Newly Acquired Items List (New Additions) (HIP 4.0 Sites)

Libraries who have chosen to implement HIP 4.0 and higher have the ability to display a list of newly acquired items for your library patrons. You control this list by settings you specify in the Horizon database. You choose the items that display on this list based on the collection group to which the items belong. (For example, you may want new items that are part of the “fiction” collection group to display on the Newly Acquired Items list.)

If you have Horizon track availability, when you check in items for the first time, Horizon stores the item number of the item in the new_item table. The Day End process, “Update Newly Acquired Items” (DeNAI), then queries the new_item table for newly acquired items and adds any to the Newly Acquired Items list. The Day End process also purges newly acquired item numbers from the new_item table.

Horizon considers an item as newly acquired when the item status changes. The date when an item’s status changes to a status for which you are tracking first availability is the date Horizon uses as the availability date for the item. When the Day End step runs, items with an “available_date” more recent than the last time the Day End step was run, and which belong to a collection group set to track new items, are put into the new_item table.

You can control these aspects of the Newly Acquired Items list:

- Which newly acquired items from specific collection groups display on the list
- Which newly acquired items Horizon tracks the availability of
- Amount of time you want to keep newly acquired items on the list
- Whether the list displays for all borrowers

NOTE

This assigns a code view to this field in the Edit Borrower window. Because the database stores all homerooms as codes, assigning a code view to this field requires staff to enter and save only a code, not just any text, in this field in the Edit Borrower window.

5 Save your changes.
• Whether borrowers can choose to *not* display the list using their user preferences

**NOTE**

For the Newly Acquired Items list, Horizon provides two options as you upgrade to 7.4. You can update the available_date column of each item in your database. Or, you can update all items except those with the item_statuses of “In Cataloging” and “On Order.” Horizon provides these options so that existing items are not shown as newly acquired when the Day End process runs the first time.

This section explains these tasks:

• Setting Up a Collection Group
• Tracking the First Availability of Newly Acquired Items
• Setting Up the DeNAI Day End Process

### Setting Up a Collection Group

In order for Horizon to maintain a Newly Acquired Items list, you must first create the collection groups to which the items belong. Each item in your Horizon database has a collection code. A collection group is simply a grouping of one or more collection codes. (For example, you may want to include all “fiction” collection codes in one collection group. Or, you may want to include only the “CD-ROMs” collection code in one collection group.) In addition, you can assign any collection to more than one collection group.

**To set up a collection group**

1. Open the `collection_group` view.
2. Click New.

![Edit: Collection Groups](image_url)
3 Complete these fields:

<table>
<thead>
<tr>
<th>Field or Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection Group</td>
<td>Enter the name of the collection group.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the collection group.</td>
</tr>
<tr>
<td>Track New Items</td>
<td>Mark this if you want to keep track of newly acquired items in the collection group you are creating.</td>
</tr>
<tr>
<td>Days New Items in List</td>
<td>Enter the number of days an item in the collection group you are creating stays on the Newly Acquired Items list. (You must mark the Track New Items box for this to work.)</td>
</tr>
<tr>
<td>Collections</td>
<td>Enter all the collections you want to include in the collection group you are creating.</td>
</tr>
</tbody>
</table>

**NOTE**

Horizon checks and stores all new references (items on the list) at the item level. This is because Horizon tracks based on collection group. (For example, if a library receives and checks in twenty copies for a single title with the “fiction” collection on a specific day, all twenty items will be added to the new_item table.)

---

**Tracking the First Availability of Newly Acquired Items**

You can set up Horizon to track when newly acquired items are first available for circulation. This feature lets you use Information Portal to send automatic patron alerts that a patron requests. Horizon recognizes that a newly acquired item is available when the item status changes to a designated status. (For example, you might want to track the first availability of items when Horizon assigns an item an “In” or “Shelving Cart” item status.) You specify those item statuses for which you want Horizon to track availability.

**To track the first availability date of newly acquired items**

1. Open the `item_status` view for the item status you are specifying.
2. Choose the item status for items you want to track the first availability date for.
Horizon displays the Edit Item Status window:

3 Mark the Track First Availability box to specify that Horizon tracks the first availability date for items with this item status.

4 Save your changes.

Setting Up the DeNAI Day End Process

The Day End process “Update Newly Acquired Items” (DeNAI) maintains the Newly Acquired Items list at your library. This process also purges the item numbers of the newly acquired items that you no longer want on your Newly Acquired Items list. (You specify the number of days you want items to remain on the list in the collection_group view.) The DeNAI process also updates the list with any newly acquired items. In addition, if newly acquired items belong to a collection group for which you no longer track newly acquired items, the DeNAI Day End process deletes these items from the list.

NOTE

The Horizon 7.4 upgrade delivers the DeNAI Day End process as an inactive process. If you want to run it with your Day End suite, you need to add it as an option to the MDayEnd menu. In addition, the process is automatically configured to run daily. Because this process accesses the item table, it may take longer to run Day End with this process added to the suite. If you want, you can set this process to run weekly, rather than daily, by changing the process argument from “/d” to “/w” (number of the day of the week.) (For example, enter “/w5” to run the process on the fifth day of the week.) The number “0” represents Sunday.
Setting Up E-mail Alerts for Newly Acquired Items (New Additions) (HIP 4.0)

Libraries who have chosen to implement HIP 4.0 and higher have the ability to let you send e-mail alerts to borrowers whenever you acquire new items with authority headings in which they have interest. (For example, a borrower might want an e-mail alert if your library acquires any new titles by John Grisham.)

This workflow outlines how the Horizon client and Information Portal work together to send e-mails alerting borrowers of newly acquired items:

A borrower may receive an e-mail that lists an item multiple times—one for each authority the borrower has defined. (For example, if a borrower chooses as an author “John Grisham”, and as a subject “Fiction - Legal”, then a new item written by John Grisham and also having the subject “Fiction - Legal” will create two lines on the e-mail for that item.

Before You Begin

- Make sure that for each location from which you want to send e-mail alerts, you have set up a return address type that should have these fields completed on the location table: Email, Reply To, BCC (optional), and Subject (optional).
- Make sure that for each borrower to whom you want to send e-mail alerts, you have set up these fields on the borrower table: Email Name and Internet Addr.
To set up e-mail alerts for newly acquired items

1. Open the `borrower_alert_config` view.
2. Mark the **Email Alerts** option if you want to specify that Information Portal sends e-mails alerting borrowers of newly acquired items that meet their specific heading preferences.
3. In the **Min Days between Email Alerts** field, enter the minimum number of days that you want Information Portal to wait before sending additional e-mail alerts.

   **NOTE**
   
   If you enter a “0” as the value, Information Portal sends an e-mail at any time. If you enter a “1” or any other higher number, Information Portal waits those number of days between sending subsequent e-mails to the borrower. (For example, if you enter a value of “10”, Information Portal waits at least ten calendar days between subsequent e-mails to the same borrower.

   The value you enter does not specify that you want Information Portal to send e-mail alerts only once every ten days for all borrowers. This prevents Information Portal from sending repeated e-mails to the same borrower within a short period of time.

4. Choose the MARC map to use for the authority heading for these authorities when the authority record is updated:
   - Author
   - Subject
   - Series

   These headings are stored in the `borrower_auth_heading` tables.

5. Save your changes.
Setting Up the DEBorrAl Day End Process for E-mail Alerts

The Day End process “Generate e-mails for new acquisitions Email Alerts” (DEBorrAl) identifies each authority heading for items which are newly available. This process also identifies items that have an availability date more recent than the last date you ran the DEBorrAl process. This process also identifies items with the availability date on, or after, the date when the borrower asked to be notified about newly acquired items with headings matching their preferences.

NOTE

The Horizon 7.4 upgrade delivers the DEBorrAl Day End process as an inactive process. If you want to run it with your Day End suite, you need to add it as an option to the MDayEnd menu. In addition, the process is automatically configured to run daily. Because this process accesses the item table, it may take longer to run Day End with this process added to the suite. If you want, you can set this process to run weekly, rather than daily, by changing the process argument from “/d” to “/w” (number of the day of the week.) (For example, enter “/w5” to run the process on the fifth day of the week.) The number “0” represents Sunday.

Setting Up the Top Circulating Items List (HIP 4.0)

Libraries who have chosen to implement HIP 4.0 and higher have the ability for staff or borrowers to display a list of top circulating items in Information Portal. You can choose to display this list in an Information Portal channel or generate a report of these top circulating titles. After the top circulating list time elapses, a new list is generated. Horizon adds titles that have the highest number of checkouts during a specified timeframe. You can choose the length of time Horizon gathers and keeps the statistics of top circulating items. You can also determine the number of titles you want to appear on the top circulating items by collection group.

This section explains these topics:

- Specifying Top Titles by Collection Group
- Controlling the Top Circulating Titles List
- Setting Up the DETopC Day End Process for Top Circulating Titles

Specifying Top Titles by Collection Group

You specify by collection group those collections for which you want to keep top circulating statistics. You must first set up collection groups. If you have already set up collection groups for the Newly Acquired Items List, you can use those same collection groups for the Top Circulating Titles, or you can set up any new collection groups. (For more information about setting up collection groups for the Newly Acquired Items List, see “Setting Up a Collection Group” on page S-203.)

You specify these options for each collection group:

- Whether you want to track top circulating titles
- The number of top circulating titles you want to track
To specify top titles by collection group

1. Open the `collection_group` view for the collection group for which you want to track top circulating titles.
2. Display the Edit Collection Groups window:

   ![Edit: Collection Groups window](image)

3. If you want to track top titles for this collection group, mark the **Track Top Titles Circulated** field.
4. Enter the number of top circulating titles you want to track for this collection group in the **Number of Top Circ Titles** field.
5. Save your changes.

---

**Controlling the Top Circulating Titles List**

You can control several aspects of the Top Circulating Titles list. You specify the date when you want Horizon to start tracking the top circulating titles for each collection group. In addition, you specify how often Horizon summarizes the Top Circulating Titles information. Horizon determines how to summarize titles by using the most recent circulation period with an applicability date that is before the summarization date. You specify how often Horizon summarizes the statistics.

**To control the top circulating titles list**

1. Open the `top_circ_control` view.
Horizon displays the Edit Top Circ Titles Control window:

2 In the Applicability Date field, enter the date when the initial tracking period begins, and when Horizon should begin accumulating top circulating statistics.

3 In the Summarize Every field, enter a number to specify how often Horizon summarizes top circulating statistics.
   (For example, enter a “1” if you want to summarize the statistics every week or every month.)

4 Mark the Days, Weeks, or Months option to specify how often Horizon summarizes top circulating statistics.
   (For example, mark Months if you want Horizon to summarize statistics on a monthly basis.)

5 Save your changes.

Setting Up the DETopC Day End Process for Top Circulating Titles

The Day End process “Summarize Top Circulated Titles” (DETopC) manages how Horizon summarizes the statistics of top circulated titles. This Day End process reviews the statistics for closed circulation periods only. Day End summarizes a period only after Horizon determines that a new period should start (based on the parameters you set in the top_circ_control view). Day End puts summary information into the top_circ_summary table. Information Portal then queries this table for a summary of information to display.
NOTE

The Horizon 7.4 upgrade delivers the DETopC Day End process as an inactive process. If you want to run it with your Day End suite, you need to add it as an option to the MDayEnd menu. In addition, the process is automatically configured to run daily. Because this process accesses the item table, it may take longer to run Day End with this process added to the suite. If you want, you can set this process to run weekly, rather than daily, by changing the process argument from “/d” to “/w” (number of the day of the week.) (For example, enter “/w5” to run the process on the fifth day of the week.) The number “0” represents Sunday.
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  for Advanced Booking
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  for Advanced Booking
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