

Circulation—Blocks

**Enhancement#:** 3540 (12/05/2003)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** Horizon 7.3.1

**Subject:** Printing Borrower Name on Current Blocks Screen

**Proposal:** The borrower name shows on the printout of the CKO screen, but does not for Current Blocks. Please add the borrower name and amount due header to the printed area of the Current Blocks screen. Since we've lost the functionality of printing a report for an individual without having to run an entire grade level in Reports Manager, this is an important feature for our library staff so that they can quickly print out blocks information that is complete and professional-looking.

**Enhancement#:** 3564 (01/14/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.3.1

**Subject:** Noprint Override to Auto Printing Hold Notice

**Proposal:** Patron telephones library, inquires if book available. Is told book is available. Patron asks to have it "reserved". They will come pick it up. A printed (or e-mailed) notice is not needed in this instance, but the flow of the item to the hold shelf with its corresponding status and expiry date is to be desired. If one has set the hold block type to print (as would be the case generally for holds) printing of this notice is unavoidable unless the patron checks out the item before the hold notice is printed. An option might be useful here, perhaps in the popup window that appears after one moves an item from request to hold, to turn off printing (or e-mailing or telecircling) of this particular notice in any auto notice action.

**Enhancement#:** 3567 (01/16/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.2

**Subject:** Using Collection Codes to Block Certain Items

**Proposal:** We would like a way to block a particular BType from checking out an item from a certain Collection Code. I know you can do it using ITypes, but this won't work for us. We have an IType of Movies. All patrons can only check out a total of 5 Movies. However, movies are divided in the Collection Codes as DVDs and Videos. Our DVD collection is still very small, so although we check out videos to patrons from other libraries, we would like to restrict them checking out DVDs. If I separate them as ITypes, Horizon will no longer count a combination of 5 movies as the checkout limit.

**Enhancement#:** 3636 (02/13/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** Horizon Circulation 7.02

**Subject:** Lost Processing Fee Automatic Waiver

**Proposal:** Right now when an item becomes lost Horizon creates a Handling Fee to be added to the cost of the item.

If the Lost item is found and returned the patron is credited with the cost of the lost item BUT not credited for the handling fee. We already charge a late fine so in addition the patron has a processing fee and a late fine. The staff has to waive the processing fee.

The processing fee is added automatically through Horizon. Is there a way to set up the program to have the option to choose to waive the processing fee automatically and credit the patron when the Lost Item is checked in, just as it does for the cost of the item?

This would be a great enhancement in the Public Library Setting for more accuracy for the patron.

**Enhancement#:** 3681 (03/01/2004)

**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** Horizon 7.3  
**Subject:** Claims Returned  
**Proposal:** Do not allow the deletion of a claims returned block from a borrower's record in CKO. Require that the item be checked in or the status changed in CKO as it is now with the status of lost or checked out.

Currently, a claims returned block can be deleted from a borrower's record without running the item through CKI. Is there a reason why this is so? This allows the block to be removed without the status of the item to be changed. This was discovered by Dynix support while handling log express # 1460322.

**Enhancement#:** 3703 (03/10/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.24

**Subject:** Sorting Blocks

**Proposal:** It should be possible via parameters to specify which blocks will appear at the top of the list in a borrowers record in circulation ie. "most important" (to the library service) appear first - they currently do not appear to sort in any order whatsoever. Alternatively, an option for setting a default alphabetical or date sort either in parameters, or in the circulation blocks screen itself.

**COMMENTS (Enhancement Cmte):** See Dynix documentation for 7.3 Circ Setup

**Enhancement#:** 3709 (03/14/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.24

**Subject:** Making Important Blocks Stand Out Further Via Coloured Text

**Proposal:** Is it possible to allocate a colour to blocks so that important blocks can be marked as standing out in red (ie. when viewed in Checkout on the blocks screen)?

**Enhancement#:** 3715 (03/17/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** Horizon 7.3

**Subject:** Claims Returned

**Proposal:** 1. Create a process that allows library to set a time frame for rolling over claims returned to lost after X amount of days.

2. Create a check box to allow library to choose whether to charge fines or not on claims returned items when they are returned through the book drop.

3. Create a check box to allow library to choose whether to charge fines when a claims returned item is returned as part of the check out process.

Currently, users can use claims returned to keep an item out indefinitely without any consequences. This would close this loophole. These are all options we had with basic Dynix.

**Enhancement#:** 3730 (04/08/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.23

**Subject:** Blocks Pop-up Message

**Proposal:** At CKI the Blocks pop-up message should not appear if there are no blocks for the borrower. Currently a pop-up appears reporting that there are no blocks, which needs to be cleared before further action is taken. This causes unnecessary work and delays service to users.

**Enhancement#:** 3774 (05/19/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.2.4  
**Subject:** Lost/Damaged Item Info to Show All Fines/Overdues  
**Proposal:** Data for lost/damaged items should include all fines (overdues)

**Enhancement#:** 3776 (05/20/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.2.4  
**Subject:** Lost Item Processing Fee—Auto Drop  
**Proposal:** Currently, if a lost book which has not been paid for is checked in, the cost of the lost book is removed automatically from current block screen, but processing fee remains. Automatically remove the processing fee to save staff time.

**Enhancement#:** 3778 (05/20/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.2.4  
**Subject:** Not-Picked-Up Fees—Auto Generate  
**Proposal:** Blocks: Automatically generate NOT PICKED UP fees

**Enhancement#:** 3779 (05/20/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.2.4  
**Subject:** Borrower History—Improve Display  
**Proposal:** Blocks: Have history be more easily readable so as to identify fines, overdue, lost books.

**Enhancement#:** 3848 (07/20/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** Horizon 7.3.2  
**Subject:** Replacing Expired Holds From the Block Screen  
**Proposal:** We'd like to be able to replace an expired hold from the block screen when the customer is informed that their hold expired and they would like to try again. This happens frequently.

**Enhancement#:** 3859 (07/26/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** Horizon 7.3.2  
**Subject:** Block for Hold Cancelled by Checkout  
**Proposal:** We are interested in having requestable and non-requestable items on one bib record. We tested what would happen if a patron with a hold on such a title checked out a non-requestable item and the system deleted their hold. We would like to see the system also generate a block when the hold was deleted.

**Enhancement#:** 3885 (08/10/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:**  
**Subject:** Maximum Fine  
**Proposal:** We would like to be able to set a maximum fine on a Btype that would override a group of fines on ltype. For example if the maximum fine per item is \$3.00 and the borrower has 20 items the fine would be \$60. If there was the ability to set a maximum fine for a borrower to \$20 then this would override the \$60.

**Enhancement#:** 3893 (08/17/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** Horizon 7.3.2  
**Subject:** Deleting Blocks  
**Proposal:** Add logic to the coding that will stop people from deleting blocks with monetary value associated with them.  
 If a staff member needs to remove/delete a block with monetary value they can simply waive the block.

**Enhancement#:** 3894 (08/17/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** Horizon 7.3.2  
**Subject:** Lost Item Paid For, Later Found  
**Proposal:** If a customer loses an item, pays for it, and then finds and returns it, the charge for the lost item is deducted from their record, which we think is appropriate. However, we think it should also post an overdue charge on the item. So, if the charge for the lost item was 19.00, which they had paid, when the item is returned they should be charged 8.00 (our maximum fine) and only refunded 11.00.

**Enhancement#:** 3903 (08/23/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** Horizon 7.3.2  
**Subject:** Damaged Item Status Block  
**Proposal:** When an Item is checked in with in Damaged Mode we want the borrower's record to create a block with the damaged fee based on the default price of the item in the item record. We want the ability for that price to be editable. This was functionality available in Dynix release 180 but it is not part of the current functionality of Horizon.

**Enhancement#:** 3906 (08/23/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.3.2  
**Subject:** When a Borrower Has an Overdue Block We Want to be Able to Change the Duedate to a Future Date  
**Proposal:** When a borrower has an overdue block we want to be able to change the duedate to a future date. After we change that due date fines that have been accrued should reverse and be removed from the borrower record if the date was changed to a future date. This was functionality in Dynix release 182.

**Enhancement#:** 3909 (08/25/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.3.2  
**Subject:** Refund Credit for recovered Lost items  
**Proposal:** When lost items are returned, Horizon automatically refunds the borrower the assessed replacement fee.  
 Many of our member libraries have policies against giving refunds--or against giving refunds after a certain amount of time has passed. They do not want the software to automatically assume that they should be given a refund.  
 We would like to see a setting by location or by ltype that would control whether Lost items that are checked in will clear Lost replacement cost blocks--or even better, will refund or now depending on how long the item has been Lost.

**Enhancement#:** 3948 (09/20/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.3.2  
**Subject:** Font and All items outs  
**Proposal:** We (170 schools) would like all items to automatically appear when you scan the borrower's barcode without having to select All Items Out button. As well, have red coloured font for overdues/lost and regular font colour for books being signed out.

**Enhancement#:** 3959 (09/23/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.32  
**Subject:** Allow comment to be printed on hold slip  
**Proposal:** We would like to have the option to print on the hold request slip the comment that the user or staff person had entered when they placed the request.

**Enhancement#:** 3986 (10/07/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.3.2  
**Subject:** Blocks Color Background  
**Proposal:** Subject: Suggestion for Horizon 7.3.2 and above  
Description: We have recently moved to 7.3.2. The Blocks screen is really indistinguishable. If you hesitate for awhile you realize what screen it is. The front line staff seem to have a problem with this. They get it but it is not a quick response they have to think where they are.  
Suggestion: Couldn't you make the Block screen more distinguishable if you made that Block screen with a light green or yellow or any other light color background so that when it came up you would know right away you were in blocks? Just a suggestion.

**Enhancement#:** 3987 (10/08/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.3.2  
**Subject:** Additional Request Deleted Blocks  
**Proposal:** While there are 4 different blocks relating to \*holds\* canceled, that distinguish between the various reasons for the cancellation, there is just one block for requests canceled ('request deleted'). There should be at least 2 - Requests deleted by borrower & Request deleted by library.

**Enhancement#:** 4002 (10/13/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.3  
**Subject:** Block detail needs due date/time and CKO time  
**Proposal:** The due date and due time need to appear on the block detail window. The CKO time also needs to appear on this window. This is of primary importance for items with very brief loan periods (hourly).

**Enhancement#:** 4011 (10/18/2004)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 732  
**Subject:** Eighty character limit for note in current\_blocks table  
**Proposal:** The comments field in the current\_blocks table is hard-coded to be 80 characters long. Our staff would prefer to be able to add notes that are longer. A lot of times the problems

that occur are complicated, (especially in the AV area) and eighty characters are not enough to even explain the situation, or problem, let alone describing a work-around, or a resolution. Staff have resorted to adding multiple note blocks, which can become cumbersome. Also, other staff members who read the note/notes find it hard to understand the complete message when the text is broken up in multiple notes or comments.

**Enhancement#:** 4012 (10/18/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:**

**Subject:** Lost Items Should Be Immediately Visible

**Proposal:** Our libraries would like the lost item count to appear at the top of the block window along with number of overdues, fines, and overdue accrued amount for the purposes of not allowing persons with lost items access to more items.

**Enhancement#:** 4036 (11/01/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.3.2

**Subject:** Ability to Disable the Group All Related Option

**Proposal:** Currently, if a patron has blocks there is an option in the Blocks pull down menu to select ``group all related.`` By doing this overdue notices, fines, etc are grouped together will no indication that this is happening. If the group all related option is left checked there is confusion among staff members.

We`d like to be able to disable or hide the Group All Related option so that folks don`t accidentally select it.

**Enhancement#:** 4037 (11/01/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.3.2

**Subject:** Enhanced Block Sorting

**Proposal:** We`d like to see an enhanced block sorting feature that allows staff to sort a patron`s blocks by type, date, title, amount, etc. This is not simply sort alphabetical. We`d like to be able to select an exact sort based on our needs. For instance - all lost blocks first, then overdues by title, then fines by amount, etc. This should be available from the Blocks drop-down menu and as a separate page with multiple options and configurations.

**Enhancement#:** 4083 (12/13/2004)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.33

**Subject:** Checkin of Claims Returned

**Proposal:** ...should result in auto-calculation of fines at Checkin IF the item had NOT been returned (contrary to the borrower`s ``claimed return``)--and the block should be removed. (The borrower might STILL be blocked, but for another reason). If the item is checked in and was NOT checked out, no fine is applied, the block is removed, and the item returns to its ``normal`` status (whatever that should be at that time).

**Enhancement#:** 4144 (01/17/2005)

**Category:** Circulation

**Subcategory:** Blocks

**Software Version/Release:** 7.33

**Subject:** Notice Fees

**Proposal:** Automatic fee charge when the 2nd and final overdue notices are printed, as we are currently manually entering the \$3.00 fee at this time.

**Enhancement#:** 4145 (01/17/2005)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.33  
**Subject:** Block notes  
**Proposal:** Increased space (2 lines) for block notes

**Enhancement#:** 4147 (01/17/2005)  
**Category:** Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.3.2  
**Subject:** Request Deleted Blocks -- additional message  
**Proposal:** When staff in circulation or cataloguing delete a hold for a patron a requested deleted block is added to the borrower record. However there is no way to add a message at the time of cancellation. We would like to have this implemented.

**Enhancement#:** 4184 (02/17/2005)  
**Category:** Horizon > Circulation  
**Subcategory:** Blocks  
**Software Version/Release:**  
**Subject:** Hold Notification Deleted When Item Checked Out to Borrower  
**Proposal:** The hold notification block should be deleted when the item is checked out to the borrower for whom it is on the hold shelf.

**Enhancement#:** 4200 (03/08/2005)  
**Category:** Horizon > Circulation  
**Subcategory:** Blocks  
**Software Version/Release:** 7.3.2  
**Subject:** Overdue Items Checked in Under Book Drop  
**Proposal:** For all overdue items checked in under `book drop` and `reset date` options, all fines must be calculated according to the reset date. Patron history must show a real date/time check-in and backdated check-in.

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**Enhancement#:** 4296 (05/17/2005)  
**Category:** Horizon > Circulation >  
**Subcategory:** Blocks  
**Software Version/Release:** 7.3.2  
**Subject:** Provide option to make patrons lost block exempt  
**Proposal:** Provide the option for libraries to be able to make certain patrons exempt from getting lost blocks similar to the way they can be made exempt from overdue fines blocks. Some of our fine exempt staff and patrons are getting lost blocks placed against their patron records when the materials they have checked out age to the Lost status after becoming overdue. Since fine exempt patrons have been told that they won't be charged fines, this sometimes causes them to become irate. Although we can waive the fine, it would be nice for the system to recognize the user's exemption and simply not place the block at all.

**Enhancement#:** 4317 (05/31/2005)  
**Category:** Horizon > Circulation >  
**Subcategory:** Blocks  
**Software Version/Release:** Horizon 7.3.2  
**Subject:** No Block To Alert Staff of Expired Hold  
**Proposal:** A block to appear when you first scan a borrower's card after a hold has expired. Currently expired holds go straight to history and no block appears to alert staff.

**Enhancement#:** 4323 (06/06/2005)**Category:** Horizon > Circulation**Subcategory:** Blocks**Software Version/Release:** 7.3.2**Subject:** Fine Payment Box

**Proposal:** When you are taking payment and the Fine Payment box pops up, it would be useful if the Amount wasn't filled in. Often libraries are taking an amount different from what the total amount due and sometimes clerks forget to change that amount box to match what they are taking. If it were blank they would be forced to fill in the amount they are taking.

**Enhancement#:** 4351 (06/28/2005)**Category:** Horizon > Circulation**Subcategory:** Blocks**Software Version/Release:** 7.3.2**Subject:** Add Fee: Need Location Information

**Proposal:** When we Add Fees through the Blocks menu, no location displays with the fee. We would like to be able to modify the fees edit screens to add a required location field. This would default to the login location. Currently no location displays on our manually added fees.

**Enhancement#:** 4373 (07/27/2005)**Category:** Horizon > Circulation**Subcategory:** Blocks**Software Version/Release:** Horizon 7.32**Subject:** Annual Record Check Block in Shelfcheck

**Proposal:** Have the address check prompt apply to self check without manually adding an acr block to each borrowers record .

We set the address check on our borrower records every 365 days. At a checkout terminal, the registration update template appears, prompting staff to check the borrower's information for any changes. DYNIX has explained that, since this address check is not an actual block, there is no way to have self check direct the borrower to the circulation desk to update the record. An actual block, such as acr has to be added to the borrower record to flag the record for updating. Having the address check tadd a block automatically to the borrower record would allow us to update the records of those users who only use selfcheck.

**Enhancement#:** 4382 (08/11/2005)**Category:** Horizon > Circulation**Subcategory:** Blocks**Software Version/Release:** 7.3.2**Subject:** Self-Removal or Automatic Expiration of Blocks

**Proposal:** One of our customers pointed out that when notifications of cancelled holds linger on the customer's record, it's preserving personal information that the customer wouldn't necessarily want preserved. We rely heavily on self check here, so it could be a while before a customer was dealing face to face with a staff person who could remove the block. Obviously they could call and ask us to remove such a notice from their record, but it could be even handier if they were able to remove it themselves through HIP (iPac). We would like to specify that the `hd` block could be deleted by a borrower via HIP after seeing the message. An acceptable alternative solution would be to add a column to the block table so the staff could control the number of days a block stays in current\_blocks before being moved to bloc\_history--this would allow the staff to set the `hd` block to 7 days in current\_blocks then have Dayend move this to history.

**Enhancement#:** 4412 (09/23/2005)**Category:** Horizon > Circulation**Subcategory:** Blocks**Software Version/Release:** Horizon 7.3.2**Subject:** CKI Notes

