

Circulation—Checkin/Checkout

Enhancement#: 3508 (11/27/2003)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.21mm (cj)-.g client
Subject: CJK Systems-Borrower Long Circulation History
Proposal: APAC region have a local customisation that records borrower cko details. This provides previous borrowing history for borrowers. Library requires this expanded to include cki detail.
(There was a Vantive log ref 1382004)

Enhancement#: 3510 (11/29/2003)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.3
Subject: In Transit Status
Proposal: If an item is checked in at another library -- status changed to Transit, the CKI location (and perhaps the borrower information) should stay with the item record until checked in at the owning library. At present, if the item is not returned to the owning library immediately, there is no way to track it.

Enhancement#: 3548 (12/23/2003)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.2
Subject: Maintain User Between CKI/CKO
Proposal: Will Horizon ever have or is planning to have a feature where the borrower is maintained in the cki/cko screen when checking in and out?

Enhancement#: 3559 (01/09/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release:
Subject: Bookdrop Checkin Date and Time Display
Proposal: Is it possible to add a BURB in patron's records when an item is checked in from the bookdrop of the fact that the item was left in the bookdrop? That way a patron cannot tell a fib and say they got the item back on time because it would display that the item was not here at closing time and item was late since it was checked in from the bookdrop on the next business day? This feature was available in Dynix and our Circulation Dept. feels it is very important to have a record of this.

Enhancement#: 3573 (01/23/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.3
Subject: The Ability to Not Display the Item Status on the BIB Show Detail Screen
Proposal: This is confusing when there is more than one copy because it displays the status of the first copy on the show copies screen. So if that item is checked out it will say checked out even if one or more copies are checked in. This forces us to check all copies before being able to determine if a copy is available.
We would like to be able to customize our view of this screen to remove this status or to be able to have the status indicate if any copies are available first before showing checked out. (i.e. on a bib level rather than on an item level.) Or even adding another status that would indicate if any of the items are available that are attached to the bib.

Enhancement#: 3579 (01/30/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.3.1
Subject: Missing Inventory Item Found
Proposal: Display a message in CKI showing that a "missing inventory" item has been found. Currently no message shows, and the item status simply shows "shelving cart."

Enhancement#: 3582 (02/02/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3.1a
Subject: Inhouse User & Checking Not Checking Item Status
Proposal: When an item has a status of "checked in" is checked in under "in-house use" it needs to have it's status changed to "shelving cart" I did some testing and no method of checking in causes the status to change to shelving cart.

When we pick up books off the tables and bring them to Circulation to be scanned for the "inhouse" use count, we put them on the shelving carts to be reshelved. The system needs to accurately reflect this process. Right now when you scan an item the status remains unchanged.

----- < copy of email sent to me by library staff member > -----

Items being checked in under in-house use are not showing up with the status of shelving cart. Sean and I did a little experiment this morning to see why the reference materials and children`s materials being checked-in did not have shelving cart as their status and the only thing we could determine is that checking items in under in-house use does not change their status. Everyone should be aware of this fact and be sure to check the shelving carts for missing books (if they are not already doing so).

Enhancement#: 3586 (02/03/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.2
Subject: List of Items Out at CKI
Proposal: Is it possible to display a list of all the items a borrower has out at CKI? After an item has just been checked in for a borrower, they often ask if they have any more items out.. At the moment, this involves switching to the CKO screen and scanning in their borrower barcode. This feature was available in Dynix Circulation.

Enhancement#: 3606 (02/05/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon72.1.178g CJK
Subject: Horizon72 CJK-Need Cancel Checkin Function in Checkin Window
Proposal: Need cancel check-in function in check-in window

Enhancement#: 3608 (02/05/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon72.1.178g CJK
Subject: Horizon72 CJK-Check Borrowers Checkout Information in Checkin Window
Proposal: We hope to check borrowers CKO information in CKI window

Enhancement#: 3614 (02/06/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3.1
Subject: Hold Slip Print Hold Expiry Date and Comment

Proposal: It would be helpful to circ staff if it was possible to print the hold expiry date on the Hold Slip. Staff check in an item and a hold slip is printed but, when they later place a call to the patron they do not have the exact expiry date available to relay to the patron. It is not always possible to retrieve the date from the Hold window that is displayed and, when in a hurry, staff forget to note that information on the printed slip.

Enhancement#: 3615 (02/06/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.3.1

Subject: Add Request Comment to Hold Slip

Proposal: Staff working with the final steps of filling a request are unaware of any Comment added by patrons at the time the request was placed. This information would be useful as patrons tend to supply alternate contact information or specific requirements about the request.

Enhancement#: 3616 (02/06/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.23

Subject: Display Blocks Window Before the Renew Registration Window

Proposal: In Checkout, when a borrowers record is pulled up, if their account has expired an "expired library registration" window is displayed with option to renew or checkout w/o renew. After a selection has been made, if the borrower has any blocks on their record, the "Current Blocks" window displays.

By our libraries policy, we do not renew a borrower if they have outstanding blocks.

I am asking, that the display order of these two windows be reversed.

If a borrower has blocks, can these be displayed first so that if their card needs renewal the clerk is aware of the blocks first.

Enhancement#: 3588 (02/03/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.23

Subject: Display of Borrower Name in Checkout Window

Proposal: In the CKO window, the borrower name is cut off if it is longer than about 25 letters. Sometimes this results in only the borrower's first name being displayed, which can cause confusion. There is currently no way of lengthening this display in the "cko" mq_view as it is hard-coded. Can this field be made available for customisation via the mq_view?

Enhancement#: 3646 (02/17/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.3.1a

Subject: Circ Receipts

Proposal: Our circ receipts are currently showing the full barcode for a patron; our patrons are concerned that this involves a risk in case they lose the receipt someone else could use their barcode. All card transactions, as well as teller machines now display only the last four digits of a persons account number. Is it possible to do the same for our circ receipts?

Enhancement#: 3647 (02/17/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: Horizon 7.3.1a

Subject: Make It Possible to Find the Actual Renewal Date When an Item is Renewed Before it is Overdue

Proposal: When someone renews an item before it is overdue, we have no way of finding the renewal date. We have `always renew from now` ticked in the location table. If the borrower brings the item back after it became overdue in the 2nd loan period, we cannot look at anything and say definitively "You renewed the item on Jan 3 and it became due on Jan 31 so when you brought it back on Feb 2 it was 2 days overdue." We have to count backwards on a calendar to say when we guess the borrower renewed the item. This makes us look like we don't know what we're doing or talking about. We think the system should easily supply us with this information.

Enhancement#: 3660 (02/23/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.23

Subject: Adding a Checkout Note

Proposal: Is it possible to add a checkout note to an item that would function in the same way as a checkin note? I want a reminder note to display each time items of a certain item type (i.e. 18-rated videos) are checked out.

Enhancement#: 3673 (02/25/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 73.1a

Subject: Closed Dates Not Counted in Circ Period

Proposal: There needs to be a setting that allows sites to choose whether or not to count closed dates as part of the circ period.

This is especially necessary for Schools who operate on rotating schedules where the class is in every four (or what have you) days. The current system of calculating due dates does not allow this type of schedule.

It was an option in DRA classic...

How they handled it was to set a day as closed (charge fines) or closed

if the day was closed/charge fines it was counted in the loan period, and in fine calculations. If the day was marked just `closed` it was not counted in fine calculations or loan periods.

Please implement this feature, it is greatly missed by our 42 media centers.

Enhancement#: 3684 (03/02/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.2.4

Subject: Group Checkin Receipt-Adding Total

Proposal: Print the total # of items returned on the bottom of the Group Checkin Receipt. This is for users who return multiple items at a time, and use the count to determine that all items they returned were correctly checked in.

Enhancement#: 3667 (02/24/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.03

Subject: Change Operator Button (F3)

Proposal: We had spoken with Brian Rawlings back in March 2003 regarding the Change Operator Button. It appears that in the current product 7.3 the change operator button was partially fixed. The change operator button now does display the current user's name at the bottom of the screen however, the second part which is the most crucial is the fact that it allows you to hit cancel. If user (A) has higher security privileges and chooses change operator then if user (B) who has lower privileges comes behind user (A) and hits the cancel button, Horizon maintains the previous user which is user (A) privileges. This then allows those user with lower privileges to inadvertently have the same privileges as the higher security group. I also including a copy of the email that we sent back in March 2003.

I would also like to add that we would like to see the change operator button turn back into a F-key as it is

now in our current version. It is less time consuming when someone is trying to change operators.
 "**change*user*" in log express and found resolution #529027.

Description: When you press F3 in the circ module, Horizon is supposed to change users. It's not working at any passkey level. At the bottom of the screen the initial circ user name still displays after using F3 or File, Change user to change the user.

Resolution: This has been identified as a software defect in Horizon 7.01, 7.02, and 7.03. For tracking purposes it has been assigned a defect log number of CR 1151. This has been fixed in Horizon 7.2.1.

Enhancement#: 3698 (03/09/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: Horizon 7.24

Subject: Truncate to Expiry Date vs. Truncate to Due Date

Proposal: Horizon defaults to Truncate to Expiry Date. We would like the option to default to Due Date As Is. This would hopefully have the added benefit of allowing our 3M Self Checkout units to default to Due Date As Is, instead of the current Truncate to Expiry Date which causes problems with patrons who are expecting the normal loan periods.

Enhancement#: 3695 (03/04/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.3.158.9

Subject: Place Needed on Screen to Enter Name

Proposal: To accommodate school needs there should be a place on the checkout screen like the one that says "item or borrower barcode" only it should say "borrower name". You shouldn't have to press F4 to get to this. If you want to succeed in the school market you need to accommodate libraries where students who don't carry around id cards.

Enhancement#: 3717 (03/19/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: Horizon 7.3.1a

Subject: Date Formats Especially for Checkout Receipts

Proposal: We would like to be able to print checkout receipts that show that items are due on Thursday, March 5, 2004. Currently we are only able to use the more ambiguous due date format of 04/03/05. While we print on the slip that the date format is yy/mm/dd, we still find that people get confused and we aren't that surprised. Until the year 2032, there will be many days in the year that are potentially confusing when using 2 digit date formats.

Ironically, when we are on PC Reliance, we can print much clearer date due slips. We may be checking out items to delinquent borrowers, but at least we are giving them a clear date due slip.

Enhancement#: 3718 (03/23/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: Horizon 7.3.1

Subject: Student Pictures

Proposal: We have student photos all in jpg format in a network folder for use with our student information system. We would like to be able to use those pictures with Horizon to show during circulation for example. That way we would know that the child we are checking out a book to is the child he/she claims to be.

Enhancement#: 3743 (04/16/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: Horizon72.1.178/gCJK
Subject: Horizon721 CJK-Add a Button for Displaying All Items Out in Checkin Window

Proposal: Add a button for displaying all items out in CKI window
 It's frequently that students asked about how many items were still attached to their records when they come to CKI to return books. But the information couldn't be checked in CKI. So the staff had to turn to CKO module and search for the borrower's record. Sometimes, the borrowers didn't take the borrower cards with them, which made the searching more complicated. It will be more convenient if there is a button for displaying all items out in CKI window.

Enhancement#: 3749 (04/21/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release:

Subject: Hourly Loan Truncation

Proposal: When checking items out during the last hourly loan period of the day, Horizon automatically checks the item out overnight. We would like the option to truncate the loan period to closing for those items we do not wish to leave the library. We see the need largely to support hourly loans within the building such as course reserves. This should not be limited to course reserve materials as libraries often have materials that are not on course reserve that have an hourly loan for use in the building only.

Enhancement#: 3758 (04/29/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release:

Subject: In Transit Message Which Appears on Checkin

Proposal: When staff process a lot of items which have come in the Courier run from another branch, when each item is checked in it gives the message that the item was in transit. This creates an extra step for all those items. It would be good to be able to turn this off.

Enhancement#: 3767 (05/12/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.31a

Subject: Set Multiple Items to Checkout

Proposal: In our Archives circulation, we'd like to send multiple items from the item/copy list to CKI/CKO. Currently the system gives a message saying only single items can be sent to CKI/CKO.

Enhancement#: 3777 (05/20/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.2.4

Subject: Display of Blocked Items on Renewal

Proposal: When renewing all items and items are blocked from being renewed, identify them clearly. As it is, staff must scroll down and hunt for items not renewed.

Enhancement#: 3790 (05/25/2004)

Category: Circulation

Subcategory: CKI/CKO

Software Version/Release: 7.3.1a

Subject: Renewals at Checkin

Proposal: For a future upgrade, it would be very helpful if after renewing an item the renewal option would default back to the standard check-in. Or if a message generated asking if we'd like to exit renewal mode.

As it is now if you have the renewal mode or exempt charges selected they remain active until you turn it off. This makes it easy to make a mistake especially when different people are working on the same PC.

Enhancement#: 3792 (05/28/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3.1
Subject: Clearing Checkin Note
Proposal: At present you can only clear a CKI note if you are logged into the branch that owns the item. We dispatch all items from a central location called ts (Tech Services). We do this so that all items leaving the processing center can be put into transit and accounted for. We would like that location to be able to clear all CKI notes.

Enhancement#: 3796 (06/04/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3.1a
Subject: Staff-Only Items Set by "Lost to Staff Only" Should be Cleared Upon Checkin
Proposal: Items are set to staff only as part of the `missing to staff-only`, `lost to staff-only` or `claims returned to staff-only` process by Day end. If the lost book comes back, the staff-only status should be cleared by checkin. All of my sites assume this is the way it works, but it doesn't. I think at the very least a block should come up offering the option to remove the staff-only status.

Enhancement#: 3797 (06/08/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.3.1
Subject: Printing Receipts in Circulation Checkout
Proposal: Before the latest upgrade, when we had cleared a borrower record from CKO, we could press F11 and we would have a receipt printed with the borrower barcode number of the last person to have an item issued. This no longer works. We haven't been able to find another shortcut key that does this. Please could this feature be reinstated in a future release of Horizon?

Enhancement#: 3806 (06/21/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.3.1
Subject: Damaged Checkin, Need Ability to Change Borrower
Proposal: When an item is checked in through damaged CKI, it is severed from the patron record and no charge is applied. We want to have damaged CKI charge the patron. It would be best if each library could choose to charge or not charge for damaged CKI, depending on local policies.

Enhancement#: 3814 (06/30/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3.158
Subject: Messages at Checkin
Proposal: With these messages that come up I would like it to require something other than an enter prompt. We have lots of problems when people are checkin in and not watching the screen and items don't get checked in properly. If it required a function key or a letter/enter combination holding the barcode/title on the screen that has the problem that would help.

Enhancement#: 3818 (06/30/2004)
Category: Circulation

Subcategory: CKI/CKO
Software Version/Release: 7.3.2
Subject: Undo in Transit
Proposal: Frequently we want something in CKI, and when it goes into Transit status, we realize that some further action is needed. On Dynix we could do .TR (to force transit received). It would be very helpful if we could somehow undo the transit status or if it was possible to change the status to Trace, etc. The In Transit status is too rigidly controlled by Horizon, so it appears that libraries are going to great lengths to change In Transit items to Missing or other statuses by doing it at the SQL level.

Enhancement#: 3824 (07/06/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3.2a
Subject: Circ Receipt Font Size
Proposal: We would like to be able to adjust the font size by line on the receipt slips. For example, on an in transit slip, to make the font for the line regarding the location the item is being sent to larger and/or bolder than the other lines on the slip.

Enhancement#: 3832 (07/08/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3.1
Subject: In Checkin With Show Borrowers Option On, Blocks Always Pop Up
Proposal: If the Show Borrower option is checked, the blocks screen always opens in CKI if there are blocks. It would be far more useful in our schools if showing the borrower and showing the blocks were two separate features so staff could choose which is most useful to them. The Show Borrower option is very useful, but the blocks screen along with it is causing issues.

Enhancement#: 3833 (07/12/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.31a
Subject: Put Borrower Name on Checkout Tab
Proposal: On the tab in workbook mode, some of our circ staff have asked that the borrower name appear.

Enhancement#: 3835 (07/12/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release:
Subject: BORROWER_PHONES Not Showing Up Right on Hold Notification
Proposal: This query is executed when displaying the borrower phone number on the hold slip/alert generated at checkin:

```
select b.*, p.phone_no, c.bbarcode from borrower_with_btype b, borrower_phone p, borrower_barcode c
where b.borrower# = xxxxx and b.borrower# *= p.borrower# and p.ord = 0 and b.borrower# *=
c.borrower# and c.lost_date is null
```

This is not the best query for the borrower_phone field, as it assumes there is an ord=0, which isn't always the case. A better thing to do would be to use the min() function in the following manner:

```
p.phone_no = (select min(phone_no) from borrower_phone where phone_type = `h` and borrower# =
borrower.borrower#)
```

and skip the p.ord=0 in the where clause.

Enhancement#: 3840 (07/13/2004)
Category: Circulation
Subcategory: CKI/CKO

Software Version/Release: 7.3.1a
Subject: Selectable Default Checkin Mode
Proposal: Allow the default cki mode to be selectable by library rather than hard coded. We use Bookdrop Cki as our default cki mode & now it must be manually selected each time cki is opened.

Enhancement#: 3849 (07/20/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.3.2
Subject: Requests on More Than One Item on a Bib
Proposal: We'd like staff to be able to place requests on multiple items on a bib at one time. This would allow for requesting problem items for cataloging or processing work

Enhancement#: 3854 (07/22/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3.2
Subject: Ability to Customize Search for Horizon Users
Proposal: In the CKO window when searching for borrowers (F4) we would like to be able to create an alternate search list containing different indexes than the `default` borrower search indexes.
 This will allow some users to see ONLY selected indexes in this window (for example at one of our academics we would like student workers to see ONLY the borrower barcode and student ID indexes.) while allowing regular full-time staff to have the FULL range of borrower indexes available!
 Please refer to log 1492455

Enhancement#: 3856 (07/23/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.2
Subject: Missing Inventory Alert
Proposal: When an item is set to MI and is later found and checked in there is no message on the screen to alert the user that a Missing Inventory item has been found. The alert could be a different tone of beep or a worded message that appears on the screen.

Enhancement#: 3874 (08/04/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release:
Subject: Homebound Checkout Alerts
Proposal: That the ``This item previously issued to this borrower`` message which comes up when checking out to a homebound member:
 1. include the date the item was last borrowed
 2. be specific for magazine issues (ie. currently once the borrower has loaned any issue of the title it will trigger the message, rather than the specific issue of the title).

Enhancement#: 3875 (08/04/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release:
Subject: Placing reservations for Homebound members
Proposal: At the point of placing a reserve for a homebound member, can the system notify if the borrower has had the item before. We place requests on behalf of homebound borrowers and it is better to know at point of request, than when the book has finally arrived and is to be checked out to them.

Enhancement#: 3880 (08/06/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release:
Subject: Transit Holds Slip
Proposal: Provide a circslip specifically for Transit Holds to allow prioritized routing of these materials between locations

Enhancement#: 3888 (08/12/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release:
Subject: Separate Checkout and Renew Item Requested by Another Borrower
Proposal: Can the Program Feature in Security separate ``Checkout or renew an item requested by another borrower``? We want to be about to checkout to another borrower if a customer has it in hand or if we need to check it out to another family member. But we don`t want staff renewing an item that it on hold for another person.

Enhancement#: 3897 (08/19/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3.2
Subject: Telxon for Inhouse Use Statistics
Proposal: We would like to be able to take our Telxon units out on the floor for Inhouse use stats. At present that is not possible and we have to place each item on a bookcard and bring it to the desk. Wireless and laptops would be too costly and cumbersome to set up in all of the branches just for this. Telxon`s would be a much more portable choice.

Enhancement#: 3922 (09/02/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.2 CJK
Subject: Limit Checkin and Checkout by Location
Proposal:

1. The column headings depress like buttons, but they don`t do anything. Make clicking on them re-order the list according to that column.
2. Add Location as a column (or let user add & subtract columns). Our bookable items (equipment) are at different campuses.
3. Allow search based on Return Date as well as Needed Date.
4. Ability to scan a week`s booking calendar for a particular type of equipment (in our case), Our bib records describe the type of equipment, and each item is record is attached to the appropriate bib.

Enhancement#: 3925 (09/02/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.32
Subject: Option to Get Rid of Enhancement #8770
Proposal: Circulation statistics are now being counted by the number of pieces rather than a single checkout for a multi-item group.
 For example if I have a cd-audio book with 12 CD`s it counts as 12 CKI`s and 12 CKO`s (enhancement #8770 resolution #538532).
 This has doubled our CKO`s & CKI`s for certain kinds of materials (Audiobooks, Videos, etc...). This makes comparing statistics between months & years difficult, and makes it hard for us to use these statistics as part of our collection development process. It also `skews` statistical evaluation our general performance.

An option should be given to libraries to count by the # of pieces or a single CKO for a multiple pieces item, depending on the needs of a library.

Enhancement#: 3933 (09/10/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.3.2
Subject: Circ Slips sorted in title order
Proposal: We have had customers ask that the list of titles on their Circ Checkout slip be printed in title order to help in looking for items at home.

Enhancement#: 3955 (09/21/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.3
Subject: no alert at cki if refund due when patron lost and paid for book recovered

Proposal: Currently if a patron has paid for a lost book it changes the status of the book to missing and severs it from the patron record. This means that when that book comes in two days later, even when ``show borrower`` is checked, you only get an alert that a missing book has been recovered. There is no alert to the media specialist that a refund is now due to John Smith so she will assume that this is just a book that was misplaced at the last inventory. In schools, because rewards are tied to returning books, you often have a lot of books paid for just before a reward activity and then a few days later they show up in the return slot. The media specialist needs to know at the time of check-in if she should initiate a refund to the patron. As it is now, she will not know until another book is checked out or until a new overdue report is run. If a child doesn't come in and ask about an overdue credit he/she has a refund may never be initiated. This will become a BIG problem for schools later in the school year.

Enhancement#: 3961 (09/23/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: 7.3
Subject: CKI/CKO Windows
Proposal: We are currently undergoing Horizon training prior to implementation. One of the comments that is being made by everyone involved is how useful it would be if CKI and CKO windows could be made different colours and preferably a parameter that we could change.

Enhancement#: 3988 (10/08/2004)
Category: Circulation
Subcategory: CKI/CKO
Software Version/Release: Horizon 7.3.2
Subject: Show Suspension in Request list
Proposal: Can the suspension date show in the borrower or title request list? Now we have to go into the edit screen to see this information when checking on requests and request problems.

Enhancement#: 4001 (10/12/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon 7.3.2
Subject: Select item at Checkin to send to Cataloging or Search
Proposal: It would be helpful to be able to select an item at checkin and send it directly to cataloging or to search.

Enhancement#: 4033 (10/27/2004)
Category: Circulation

Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: Quick-Look ID on Hold Slips
Proposal: Please provide libraries with options to print at top of hold slips in larger, bold letters:

- 1 - First one or two characters of last name
- 2 - Full last name and first letter of first name
- 3 - Some combination of letters of last and first name

There should also be an option for how the above is located on the hold slip, ie. centered, right or left justified.

The result of this enhancement would be less work for staff and better customer service for our customers since most libraries have staff manually writing something at the top of hold slips to make the requested items easier to find by customers on the hold pickup shelf.

Enhancement#: 4034 (10/29/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.1
Subject: Include Due Time in CKO Receipt
Proposal: For materials that are checked out on hourly or 24 hour loans it is vital to include the time due on the CKO receipt.

Enhancement#: 4040 (11/02/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: Treat itype_group for Maximum Items Out Exceptions as a True Group
Proposal: For ``Maximum Items Out`` circ_privilege_code exceptions, treat itype_group as a true group. For example, if exception is to allow only three items out from this group, then do not treat each itype within the group as separate (e.g. can take out 3 entertainment videos AND 3 nonfic videos) as system does currently. Treat the group as one (e.g. can only take out 3 items TOTAL from either entertainment and/or nonfic videos).

Enhancement#: 4041 (11/09/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon
Subject: Ability to generate mailing labels at checkout. Had this feature in Dynix, where .p was used and clerk could specify number of labels required.
Proposal: Had the ability in Dynix to generate single or multiple mailing labels at checkout using the .p command. Could this feature please be available in Horizon. In the meantime, we are maintaining Dynix for this feature and circulating on Horizon. This creates extra steps and we are not sure how long the Dynix server can be maintained. (It reached its end of life).

Enhancement#: 4045 (10/11/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon ASp 7.3.2
Subject: Greyed Out CKO Button
Proposal: If an item belonging to a borrower with blocks is checked in, a window pops up informing the advisor of the block. Formerly the advisor had the option of clicking a check-out button, therefore allowing them to ignore a block and quickly view the borrower's record in the checkout window. This check-out button is no longer present, the advisor must now deal with the block (pay the fine or close the window etc.) then open the CKO window themselves and scan in the borrower's card. Could we have the shortcut reinstated?

Thanks, C
Hello C

I've found resolution 517118 on this: The software was changed after 5.1 to not allow one to go from the blocks screen (brought up from the CKI window) and jump to the CKO window and automatically bring with it the borrower referenced in the CKI window. Whether you go to the Blocks screen from CKI or CKO, the CKO button is now greyed out. Now, it did still work in particular builds of 7.2.3 as you know, so that change must have happened since then. It might well have been the case that it changed in US versions after 5.1 but was only changed in the UK version after 7.2. If you don't agree with the change, I would suggest that you log an enhancement request. -- L

Enhancement#: 4080 (12/13/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.33
Subject: Sort the Items Out AND Display Author
Proposal: It would be helpful if the operator could sort a borrower's items out when displayed in the Checkout window--by call number, item status, location, collection, title, etc. It would also be desirable to display author in this view.

Enhancement#: 4081 (12/13/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.33
Subject: Sort the Items Out AND Display Author
Proposal: It would be helpful if the operator could sort a borrower's items out when displayed in the Checkout window--by call number, item status, location, collection, title, etc. It would also be desirable to display author in this view.

Enhancement#: 4090 (12/13/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.33
Subject: Time Out for Settings
Proposal: In the checkin window, the ``in-house``, ``exempt fines``, and ``bookdrop`` settings, should automatically time out after a predetermined (and configurable) period. Currently, operators forget to uncheck these settings, and many items are checked in under these settings when they shouldn't be.

Enhancement#: 4097 (12/13/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon 7.33
Subject: Special Handling for Certain Types of Checkout
Proposal: There should be more features that allow for specialized functions. For example, while you can create a borrower record for our bindery, there is no special processing attached to this, so everything surrounding it is a kludge. For example, we want to be able to check out an item to a binder. In such a case, we want the item status to read ``Checked out to [name of binder]--expected back on [default date based on specified interval from checkout date]``. A borrower could request a hold for such an item--but not a recall. Currently, all we can do is create a borrower record and there is no indication to the Catalog user that this is a special type of checkout. Recalls are not automatically blocked. For reference, the legacy NOTIS system had the feature of ``pseudo patron`` set up for this type of situation. You HAVE access to NOTIS--mine it for the feature/function (applied to missing and lost processing as well)--the code of NOTIS may be obsolete, but the feature/function set is not. Re-use what makes sense--its Circ module is still generally applicable.

Enhancement#: 4099 (12/13/2004)

Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.33
Subject: Counters for Both Circulated and In-House Checkins
Proposal: There are counters for when an item is checked in and there was an existing checkout AND for when an item is checked in and there was NO existing checkout. BUT we also want the date/time of each such transaction so that we can easily run reports that identify how many items were checked out/checked during any period and how many items were checked in during any period.

Enhancement#: 4152 (01/20/2005)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon 7.3.2
Subject: Borrower credited for lost item returned msg should alert staff better
Proposal: Our libraries would like an interactive window when a lost item is returned so that staff would have to respond to the prompt notifying them that this item was lost and has been found. One particular library uses a collection agency for lost and overdue items and would like this ability.

Enhancement#: 4191 (03/01/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: Printing Multiple Workslips to Multiple Printers
Proposal: When staffing a circulation workstation, staff checks in materials while waiting for patrons to approach the desk for checkout. We print Hold Slips to a network laser printer while checking in. We have set up the parameters and bought printers so that we can print Date Due slips on a receipt printer with detuning paper so that we can detune the radio frequency security tags. The problem is, Horizon cannot send a particular hold slip to the printer required for the function--it can only recognize one printer at a time. So, hold slips print through the receipt printer unless the staff member remembers to turn off the function while checking in; date due slips print on regular paper while charging items to patrons. If Horizon could recognize which printer is required for each workslip, that would really save a lot of steps in our workflow.

Enhancement#: 4227 (03/25/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.3
Subject: Maximum Items Out by Btype
Proposal: Allow global restriction to be set for max items out based on btype. Currently, the default restriction is based on location, so if the max is 75, a borrower may check out 75 items from every library in our system, which effectively makes the true maximum several thousands of items.

Enhancement#: 4229 (03/28/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: All Items Out: Auto Display Option
Proposal: We would like the option to automatically display all items out in CKO rather than having to manually select All Items Out.

Enhancement#: 4233 (03/30/2005)
Category: Horizon > Circulation

Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: Customize Item on Hold Message
Proposal: We would like to be able to customize the ``Item on Hold`` message in CKI so that we can add the homeroom field. We don't have receipt printers so we don't print hold slips. Customizing this message would save having to look up students separately to identify their homerooms.

Enhancement#: 4258 (04/15/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon 7.3.2
Subject: Renewals of Expired Cards
Proposal: When a patron barcode is wanded or the patron is looked for by name, etc. and a renewal notice pops up, the choices are Renewal, CKO/no renewal, or Cancel. If renewal is chosen, the renewal screens open and information can be updated. When this is saved and closed, a block screen will open (assuming the patron has blocks). We would like the block screen to open before the renewal notice.

Enhancement#: 4265 (04/18/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon 7.3.3
Subject: Built-in Buffer
Proposal: Please change a build-in buffer in Horizon. It is currently 9:30 a.m., which gives an incorrect due time for two and three-hour reserve materials. We have to manually change a due time on circulation receipts.

Enhancement#: 4270 (04/20/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.3
Subject: Overdue Renewal
Proposal: In location table, there is a setting ``always renew from now``. If it is not checked, the renewal should always be from the original due date according to the manual. However, we find it is using the date the item is renewed to calculate the due date if the item is overdue when renewed. It is very confusing to library staff and patrons. We would want the renewal always based on the original due date whether the item is overdue or not at renewal when ``always renew from now`` is not checked.
Please refer to log#1539898.

Enhancement#: 4276 (05/02/2005)
Category: Horizon > Circulation >
Subcategory: Checkin/Checkout
Software Version/Release: 7.24
Subject: Home Library Borrower Log
Proposal: When lending to HLS borrowers, Horizon does not discern varying formats of the same title which are on different bib records.
For example, if a borrower reads audio books and wants to borrow both tapes and CDs (different bib records), Horizon does not differentiate between the two. A similar problem occurs if they read both standard and large type, or ``migrate`` from one format to another.
Is it possible to ``link`` titles or bib records in some way so that the message that the borrower has borrowed the title before, regardless of format, appears?

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Enhancement#: 4292/4298 (05/17/2005)

Category: Horizon > Circulation >
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.3
Subject: Noncirculating Materials
Proposal: When the non-circulating materials such as reference books are checked out, we would like to see a popup box to remind staff that these materials are non-circulating. Currently the workaround for us is to set the non-circulating itype to have the loan period to be 1 day and the maximum number of the checkout for these itypes to be 0. That was the only way now we can have a Horizon popup box to say the name of the itype and ``the maximum has been exceeded``.

Enhancement#: 4309 (05/23/2005)
Category: Horizon > Circulation >
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: Separate Checkin and Checkout for Security Setup
Proposal: We want to be able to setup a security access to allow someone to only be able to checkin items. They should not be able to access the borrower list nor checkout items.

Enhancement#: 4338 (06/15/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3
Subject: Damaged CKI as Radio Button
Proposal: Bookdrop, exempt fines, and other special check-in modes are available on the CKI screen as radio buttons, but to get into Damaged mode, we must use the drop-down menus. We would like to see a radio button for Damaged mode checkin.

Enhancement#: 4346 (06/20/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon 7.3.3
Subject: Book Clubs
Proposal: I hope that you will be able to provide information about the different ways that Horizon can help libraries to manage local book clubs.
 We have found one example at <http://www.hedbergpubliclibrary.org> in which they have ``Gab Book`` clubs. They have a single kit of 12 books in a cloth bag that one person checks out. That one person is responsible for returning all 12 books.
 (As of June 20, 2005, the Gab books are at: <http://hedbergpubliclibrary.org/gab.php>)
 To date, we have about 30 sets of 12 books that that have been used in book clubs managed by our library staff. We have been managing them via an Excel spreadsheet.
 We would like to expand this service to allow patrons to manage their own book clubs. We are concerned about losing books and the accountability of getting the patron that lost the book to replace it.
 1) If we list the books individually on Horizon, then individuals can get individual books and break up the set of 12.
 2) If we list the books as a set of 12, similar to a book on cassette which might be a set of six cassettes, then one person has all twelve books checked out to their card. However, it's not the same as the six cassettes, because in that case, one patron has all six cassettes in their house and is more likely to return all six cassettes. The 12 books will go to 12 households and are more difficult to collect and return.
 Has anything been done in Horizon to provide individual patron accountability for items within a set of items?
 Any advice or suggestions of how other Horizon libraries have handled local book clubs?
 . . . _____ has requested that I resubmit this issue (originally submitted as a Dynix log 1384397 on 05-06-2003) as an Enhancement request.

Enhancement#: 4347 (06/22/2005)
Category: Horizon > Circulation

Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: Option to Turn Off Homebound Rating Pop-up Box
Proposal: We would like to see the option available to turn-off the homebound rating pop-up box for select locations on check-in. If a homebound borrowers items are returned in the bookdrop and/or dropped off by a caregiver at a branch other than the homebound branch, the staff has no way of knowing what the rating should really be, and must insert a number and then hit ok or enter to proceed. When checking in a bin of books, this is not only aggravating but time consuming. Currently, this pop appears to be hard-coded.

Enhancement#: 4353 (06/28/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: Checkout Messages on Items
Proposal: We would like to see checkout messages on items in future releases that work the same way a checkin notes does?
 Sometimes you need to be aware of certain things when checking an item out not just when you check it in.

Enhancement#: 4385 (08/18/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon 7.3.3
Subject: Value of Items Checked Out Showing on the Receipt
Proposal: We would like for the checkout receipt to show the total value of the items checked out. This would be an excellent marketing tool to indicate value received at the library and would also give customers an indication of how much material they are responsible for.

Enhancement#: 4388 (08/21/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: Trigger to Choose Item or Patron Barcode When Using Second_ID Field
Proposal: We use the second_ID field as our patron barcode field so that we can use our district's student ID numbers rather than standard patron barcodes. Unfortunately, some of these numbers match the significant digits of our item barcodes. When staff forget to clear the CKO screen between patrons, the scan defaults to the item, checking the item out to the student currently in the CKO screen, rather than bringing up the next student as they wished. We would like to have the functionality to allow staff to choose between item and borrower barcode when a match occurs,

Enhancement#: 4392 (08/23/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release:
Subject: Ability to Not Print Receipt for InTransit Items
Proposal: Libraries would like a check box in the intransit window to de-select printing a receipt for an item in CKI which has triggered an intransit prompt.

Enhancement#: 4394 (08/25/2005)
Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon 7.3.3
Subject: Batch Change Borrower Location and Type

Proposal: The proposal for the next release is to make an option to replace in Horizon from CPV (change patron variable) in Dynix.

Enhancement#: 4411 (09/22/2005)

Category: Horizon > Circulation

Subcategory: Checkin/Checkout

Software Version/Release: 7.4

Subject: In-House Use Stats Only

Proposal: Dynix Classic offered 2 ways to gather In-House use information: item by item checkins, or a ``stats only`` entry box where the user could just enter a total by collection code without having to scan individual barcodes. Horizon doesn't have the ``stats-only`` entry option, which our libraries miss. It saved a lot of needless scanning.

Enhancement#: 4413 (09/23/2005)

Category: Horizon > Circulation

Subcategory: Checkin/Checkout

Software Version/Release: Horizon 7.3.2

Subject: Request Queue and Loan Period Override

Proposal: It would be far more useful to have the system calculate when to shorten a loan period due to the length of the request queue if it took the number of items available into account.

Currently the system will shorten the loan period at the set request queue threshold (say 5) even if the library owns 25 or 30 copies and they are on the shelf and available.

A ratio of request queue to copies would work like:

5 requests and 1 copy = shorter loan

10 requests and 2 copies = shorter loan

15 requests and 3 copies = shorter loan

and so on so that our 30 copies would need to have 150 requests before the loan period was reduced.

Enhancement#: 4417 (10/03/2005)

Category: Horizon > Circulation

Subcategory: Checkin/Checkout

Software Version/Release: 7.4

Subject: Matham setting determines calendar for due dates

Proposal: Currently, the Matham setting ``Circ settings by owning location or checkout location`` lumps together several settings governed by location tables rather than by circ privileges or parameters. One of these is whether the owning library or the checkout library's calendar is used to calculate due dates.

This should be separated out as a circ privilege or parameter. As it stands now, it is lumped in with other settings like Overdue-Lost, Lost-Missing, CR-Missing. In some cases we want the owning library to determine these. But with due date calculation we always want the checkout library's calendar to be used.

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Enhancement#: 4438 (11/01/2005)

Category: Horizon > Circulation

Subcategory: Checkin/Checkout

Software Version/Release: 7.3.2

Subject: Pop-up Box "Claimed Returned"

Proposal: Our system would like the ability to disable the claimed return box Horizon generates at check in. Staff feel this message is a nuisance and an insult to their intelligence. Our system doesn't care when a claimed return item is returned we are just glad to have it back.

Enhancement#: 4439 (11/01/2005)

Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon 7.3.2
Subject: Group Checkout Item Counts
Proposal: When someone checks out an item with a group-checkout-enabled itype, the circulation clerk enters the number of pieces that are being checked out. There is nothing to ensure that the number the circ clerk enters has anything to do with the number of items that are actually in the package or with the number of items that should be in the package.
 We would like to have a column in the item record that shows the number of pieces that should be in the kit and then have a message appear if the clerk enters something different.
 We would like the circ stats to increment by not more than the number of pieces that are supposed to be in the kit.
 This month we have had 2 cases where the circ stats have been massively skewed by a circ clerk entering a badly incorrect number at the group checkout prompt. One was 10,200 and the other was 6400. We found them with the help of support after the daily circ for the branch was way out of line. When I went looking, I found a number of less dramatic errors, but they are very hard to track because the n_pieces field is updated every time the circ clerk enters a value in the group checkout prompt box. This incident has made us feel not very confident about the accuracy of our circ statistics.

Enhancement#: 4450 (11/15/2005)

Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.3
Subject: When Holds Are Cancelled And Items Deleted
Proposal: Need to set up a trigger, so when deleting items in cataloguing, which have a hold placed on them, this can be done without a block remaining on the borrowers card notifying the borrower that the item is held for them. At present, deleted hold items still show up on borrower's card and this cannot be deleted.
 A prompt does come up in cataloguing saying that the item is on hold but this can be missed and the item deleted.

Enhancement#: 4471 (12/14/2005)

Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.3.2
Subject: Add Cancel Checkout Button To Checkin Note Screen
Proposal: We would like to see a Cancel button added to the CKI Note warning screen that pops up so that staff can avoid checking in (and thereby clearing the patron name from the item record) items that do not have all of their parts.

Enhancement#: 4474 (12/16/2005)

Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release: Horizon
Subject: Sending a Single Item to InHouse Checkout Multiple Times
Proposal: Would like the ability to specify the number of times an item was used in-house when using in-house CKI.
 When an item has been used by 50 borrowers in-house (as in a children's read-aloud program) we would like the ability to specify the number of in house CKIs the item has had, rather than scanning the item 50 times.

Enhancement#: 4477 (12/22/2005)

Category: Horizon > Circulation
Subcategory: Checkin/Checkout
Software Version/Release:
Subject: Add Borrower Number to Display on Checkout Screen

Proposal: Please could we have the option to display the Borrower Number to the CKO screen (in addition to the Borrower name and Card Number)

Enhancement#: 4478 (12/22/2005)

Category: Horizon > Circulation

Subcategory: Checkin/Checkout

Software Version/Release: 7.24

Subject: Return of Damaged Items

Proposal: Under the CKO menu when a borrower`s record is displaying in Checkout there are options to change an item they have on loan to Claimed Returned, or Lost. Can we also add Damaged to this menu so that the item stays attached to the borrower record, as we require them to pay for damaged items.

Enhancement#: 4551 (03/16/2006)

Category: Horizon > Circulation

Subcategory: Checkin/Checkout

Software Version/Release: 7.3.3

Subject: Back Date Check-ins

Proposal: If staff do not change the entire date for faculty check-outs (ie. month, day, year) the system will sign out an item that is automatically overdue. The ability to back date check-ins (as was possible in the classic DYNIX system) would allow for immediate correction of such errors.

Enhancement#: 4571 (05/08/2006)

Category: Horizon > Circulation

Subcategory: Checkin/Checkout

Software Version/Release: 7.3.2

Subject: Transit--Seeing Which Branch It Came From And Where It Is Going To

Proposal: On Dynix when we looked up an item that was In Transit or Transit Hold we could see what library put it into Transit and what library it was going to. Then we could check the shelves at both places. Now on Horizon we don`t see that trail.