

Circulation—Reports/Notices

Enhancement#: 3769 (05/19/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.1a

Subject: Grace Period Should Count Closed Days the Same as Notice Interval

Proposal: At the present software version, Grace period calculations do not include closed days, but the first_notice_interval does.

There should be a toggle in the location table that allows you to choose whether or not to count closed days when calculating grace periods.

Without consistency there are some problems with School media centers who are closed on the weekends.

The problems are limited to schools who want grace periods to end on the day the first notice is sent.

This enhancement echoes the similar problem with due dates being calculated over closed days which I logged in enhancement # 3673

COMMENTS (Jim, Dynix): Good idea

Enhancement#: 3771 (05/19/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: Horizon 7.31

Subject: Separate Burb Block for Email Notices

Proposal: An ongoing issue for circulation staff troubleshooting patron complaints about notification is the fact that they cannot distinguish between a print and an email notice.

Currently the block code is `shared` with print notices and staff cannot tell at the burb screen that this was an email notice.

Email notices should have a separate block code.

This would also make it easier to tailor notice messages for each of email and print.

While we would like to send as few postal notices as possible, it is unlikely that we will eliminate all print notices, so this will continue to be a problem for the foreseeable future.

COMMENTS (Jim, Dynix): Good idea

Enhancement#: 3803 (06/15/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 190

Subject: Reports for Special Offers (UCEC)

Proposal: To request a report on the use of special offeres, or charge exceptions.

It would be useful to get statistics from it and see how popular it was (or even certain types of stock were).

COMMENTS (Jim, Dynix): No new enhancements for Dynix

Enhancement#: 3826 (07/07/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.32

Subject: Hold Slip—Add Hold Shelf Expiry Date

Proposal: Horizon lets you add hold information to printed notices but it does not let you add the same information to the hold receipt that is printed when a checked in item fills a request.

This information is important for staff who phone borrowers to let them know that the requested item is waiting for them. It would be very helpful to also have the hold shelf expiry date so borrowers know the last date the item can be picked up.

COMMENTS (Jim, Dynix): Good idea

Enhancement#: 3839 (07/13/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.1a
Subject: Provide Subject Line for Each Type Email Notices
Proposal: Allow for a different subject line to be entered for each type of notice so that borrowers can tell if a notice is alerting them to a hold or overdue or other type of library notice.
COMMENTS (Jim, Dynix): Good idea

Enhancement#: 3841 (07/13/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.1a
Subject: Provide a Descriptive Header for Notices
Proposal: Provide a block description field that displays as a notice header for that type of notice. This makes for amore professional appearance for notice & allows for easier sorting of notice types by staff.
COMMENTS (Jim, Dynix): Good idea—Web Reporter

Enhancement#: 3860 (07/26/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.2
Subject: Patron Notices: Patron v. Item
Proposal: Provide a block description field that displays as a notice header for that type of notice. This makes for amore professional appearance for notice & allows for easier sorting of notice types by staff.
COMMENTS (Jim, Dynix): Good idea—Duplicate

Enhancement#: 3868 (08/02/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.32
Subject: Allow Ability to Format Types of Auto Notice
Proposal: Provide SA`s a way in setup to choose what data you want to print out for each type of notice in auto_notice. We have notices that aren`t printing information that is already setup in the auto_notice print_format_block. Because it`s not printing out, I`ve been told the programming is not pulling it.
COMMENTS (Jim, Dynix): Good idea

Enhancement#: 3898 (08/19/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: Horizon 7.3.1a
Subject: Allow for Notices of a Particular Type to be Printed Only
Proposal: Regardless of notification type specified in borr record, provide for printing of all notices of a particular type. In other words, make `Force Print only` field in block record work. For example, this would allow all Lost notices to be print notices, mailed, rather than delivered by email or phone, which is inappropriate for this type of notice.
COMMENTS (Jim, Dynix): Good idea

Enhancement#: 3907 (08/24/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.32
Subject: Add Collection Information to Notices

Proposal: Add collection column to notice_content table. This would allow patrons and library staff to identify if the item in question is a book, children`s book, or video etc.

COMMENTS (Jim, Dynix): Good idea

Enhancement#: 3945 (09/17/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.32

Subject: Barcode in Holds Expired/Canceled List

Proposal: We would like to see the item barcode in the Holds expired/canceled list. It would help to properly identify the item on the hold shelf. This would be particularly helpful when more than one item with the same title is currently on the hold shelf. This makes it easier catch mistakes before they happen.

Enhancement#: 3968 (09/24/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: Notice Name

Proposal: The borrower name should appear in first name last name order rather than inverted as it does now on notices in order to conform to postal regulations.

Enhancement#: 4009 (10/18/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: Horizon 7.3.2

Subject: Editing Notices

Proposal: We would like the option to go in and edit individual notices before they are sent via email or printed out.

Enhancement#: 4042 (11/10/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: Substitute Function in Pull List

Proposal: Add the function to substitute another copy of a title for specified copy request if specified copy cannot be located and circumstances indicate that another copy would satisfy patron needs. This is not a frequent occurrence but substitution saves time when a patron mistakenly places a copy specific rather than bib level request & requested copy is cannot be found.

Enhancement#: 4044 (10/11/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: Count Checkout Sessions

Proposal: Provide in AdHoc reports a statistical count of checkout sessions in addition to the number of items checked out.

Enhancement#: 4049 (10/15/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.3

Subject: Bookmobile Statistics

Proposal: Request that a bookmobile stop be stipulated when doing circulation in Horizon, so that statistics by bookmobile stop can be gathered. This should be in the Horizon product, not

limited to PC Reliance, so that on-line connections still allow recording of statistics by stop. This was a functionality on Dynix that has been lost.

Enhancement#: 4057 (11/23/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.2
Subject: How many patrons checked out materials on _____ (fill in a date)
Proposal: We do not have a report that allows us to know how many patrons checked out materials on a given date.
 For example, the Ad Hoc Daily Overview says that there were 898 1st time checkouts yesterday. For staffing reasons we would like to know how many patrons checked out those 898 items. Was it 100? Was it 500? Was it 36? (If every checkout was at the limit for total items in our library, it would take only 36 patrons to generate 898 transactions)
 From a staffing perspective, the more patrons you process, the more staff you need (all other things being equal) . Thus the ability to match checkouts and patron numbers would be very useful information.

Enhancement#: 4077 (12/09/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.2
Subject: Increase the Number of Characters Available for Notice Text
Proposal: That the number of characters available for notice text be increased.

Enhancement#: 4078 (12/10/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.33
Subject: It Would Be Nice to Have a Billing Notice That Has the Total Amount Tallied
Proposal: Please have something that shows a billing notice with the list of items that are lost or fines then a total so it really looks like a billing notice.

Enhancement#: 4087 (12/13/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.33
Subject: Printing
Proposal: We want to be able to do screen prints from any Circulation window.

Enhancement#: 4088 (12/13/2004)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.3
Subject: Notice Intervals
Proposal: We want to determine the interval between all subsequent circulation notices. Right now, the interval between the 1st and 2nd determines the interval between all subsequent notices. We need more flexibility.

Enhancement#: 4105 (12/16/2004)
Category: Circulation
Subcategory: Checkin/Checkout
Software Version/Release: 7.33
Subject: Checkout and Reserve Items

Proposal: When an item is scanned for a ``normal`` check out and the item has been flagged for reserve or it shows as already ON reserve, the operator should see the details about the reserve (active/inactive, course, instructor, which location, etc.) and be able to either proceed with the checkout (assuming applicable overrides can be done) or route the item to where it needs to be.

Enhancement#: 4116 (12/16/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.32

Subject: Preoverdue Notices

Proposal: As a newly migrating Horizon (from Classic Dynix) customer, we were shocked that existing functionality (pre-overdue notices) are not available in Horizon and it doesn't appear that it is planned in the future. I don't understand how libraries who are planning to migrate and using this functionality in Dynix currently will respond to this lack of functionality. We, for instance, send about 700 emails a night that are pre-overdues.

Enhancement#: 4119 (12/20/2004)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: Location of expired holds in AdHoc reports

Proposal: Holds expire as part of DayEnd and are currently counted as statistics in the location the DayEnd launcher runs from. In a consortium this means that we have no easy way to identify a member whose patrons routinely place holds and then don't pick them up after they arrive at the pickup location. We would like DayEnd to add the hold expired statistics to the pickup location instead.

Enhancement#: 4142 (01/14/2005)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: Processing Undeliverable Emails

Proposal: When an email notice is returned undeliverable, we would like to see Horizon automate the process of handling the email that bounces back. The customer's account should be updated to indicate the email needs to be updated, and the specific notice should be rerouted to either phone or US mail automatically.

We send thousands of emails each day, and the process of manually handling these would be significant. In order to achieve this, each email would need a unique identifying number in either the body or subject line, and a program would need to parse through the undelivered message pull the identifier and process accordingly.

Enhancement#: 4160 (01/26/2005)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: Horizon 7.32

Subject: Cell Phone on Notices

Proposal: Currently only the business and home phone numbers will print on Horizon notices. We would like Dynix to add the cell phone number to these two types.

Enhancement#: 4161 (01/27/2005)

Category: Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: Display Homeroom instead of btype at CKO

Proposal: When the borrower is displayed at CKO, allow for the option to display the homeroom instead of the borrower type. This is an extremely important feature for schools.

Enhancement#: 4173 (02/10/2005)
Category: Circulation
Subcategory: Reports/Notices
Software Version/Release: Horizon
Subject: Purchase Alerts
Proposal: We would like purchase alerts added to the Horizon Circulation Software. Purchase alert report would enable the staff user to see number of request an item has on hold and the number of copies the library owns. This is helpful in determining whether to purchase multiple copies of an item to fill a large number of requests of an item.

Enhancement#: 4193 (03/02/2005)
Category: Horizon > Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.2
Subject: More Space on E-mail Notices
Proposal: We would like more space on e-mail notices - 255 characters is not enough to do things like advertise new services and so on, after we've given the standard language and disclaimers for whatever we're informing the borrower about in the first place. E-mail is the cheapest way to reach customers and the form itself has little limitations, so why the artificial 255 character limit?

Enhancement#: 4194 (03/02/2005)
Category: Horizon > Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.2
Subject: Add Author to Notices
Proposal: It would be nice (in the opinion of one customer, at least) if hold notices also included the author's name in addition to the title.

Enhancement#: 4196 (03/03/2005)
Category: Horizon > Circulation
Subcategory: Reports/Notices
Software Version/Release: Horizon 7.3.2
Subject: Remove Views and Access for Multiple Locations
Proposal: Currently we have three members within our consortium and when accessing `Notices` in the Circulation Reports module within the Circulation folder, each location can view/print all three locations. We would like to have a solution where we can separate each members reports/notices information.

Enhancement#: 4221 (03/22/2005)
Category: Horizon > Circulation
Subcategory: Reports/Notices
Software Version/Release: Horizon 7.3.2
Subject: Adhoc Stat Reports
Proposal: We are a three location consortium and when running the Adhoc module all locations are displayed. We would like to be able to edit the display and locations included for each report type. The reason being some locations do not share circulation at all with others, hence no need for separate locations to be included on reports for other locations. This adds a lot of confusion to the staff, excessive viewing and printing.

Enhancement#: 4241 (04/04/2005)
Category: Horizon > Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.3
Subject: Borrower Invoice Formatting

Proposal: We would like to have more ability to format borrower invoices. Specifically, we want to be able to control the horizontal spacing of the borrower address and the item list.

Enhancement#: 4274 (04/28/2005)

Category: Horizon > Circulation

Subcategory: Reports/Notices

Software Version/Release: Horizon 7.3.2

Subject: Print On-Demand Billing Notices for Amounts Less Than Default Bill.
Notice Amount

Proposal: We would like to be able to print billing notices on-demand. For example, if a borrower comes into the library and says they lost a book and would like a printed billing notice asap, there is no way we can currently do this (aside from playing with btypes, which we don't want to do). We would also like to be able to print billing notices on-demand for billing amounts that are less than the default amount indicated in the Location Parameters table. In this case, the borrower had a lost item, their bill came to \$15, but our default billing notice amount is \$20. We therefore couldn't create a bill for them.

Enhancement#: 4277 (05/05/2005)

Category: Horizon > Circulation >

Subcategory: Reports/Notices

Software Version/Release: Horizon 7.3

Subject: Putting Price of Item on All Notices

Proposal: As a school library, we need the book/item price to be available as an option to be printed on all notices. This information (the item price) is important when sending notices to students and/or parents in order that they know what the cost for not looking for and returning a book will be.

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Enhancement#: 4313 (05/26/2005)

Category: Horizon > Circulation >

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: Produce Billing Notices by Block Type

Proposal: Give users the ability to send billing notices for fines accrued of a certain block type. For example, we would like to be able to produce billing notices for lost items regardless of the actual amount due, but we'd rather not send billing notices for overdue fines regardless of how much they owe.

Enhancement#: 4336 (06/15/2005)

Category: Horizon > Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: ReportsManager

Proposal: Currently ReportsManager reports the block fine amount and not the balance on the borrower record. We would like to see a balance functionality in ReportsManager.

Enhancement#: 4339 (06/16/2005)

Category: Horizon > Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.3

Subject: Holds List in Barcode Order

Proposal: We would like to get a daily report of items that should be on the holds shelf in borrower barcode order. This would allow us to put the holds on the shelf so that the borrower could pick it up herself, without our having to wrap the book to preserve the borrower's privacy - the

thinking being that borrowers don't know each others barcodes and the confidentiality of what people are reading would be preserved.

Enhancement#: 4374 (07/28/2005)

Category: Horizon > Circulation

Subcategory: Reports/Notices

Software Version/Release:

Subject: Notices to Children

Proposal: It is generally not seen as customer friendly if a library threatens a six-year old with legal action; we are getting bad publicity because the notices are sent direct to children. If the borrower is a child, the notices should go to the person legally responsible. Please could there be an option to send notices to the parent/guardian/guarantor, rather than the borrower. Our present workaround is to put a line in saying ``For the attention of `(guarantor name)`` but this is not adequate.

Enhancement#: 4384 (08/15/2005)

Category: Horizon > Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: Request Notification Block Type Based on Pickup Location

Proposal: One of our consortium members chooses to use the phone instead of printed mail for hold notices. When users from that consortium chooses to pick up their materials at one of our branches, a phone notification block is created for that user. Since our library system does not use phone notification, the user never receives any kind of notification that their request is waiting on the shelf to be picked up. It would be nice if there were some way to choose which location's block type to apply or if the block type applied was based on the holds pickup location rather than the borrower's location.

Enhancement#: 4395 (08/26/2005)

Category: Horizon > Circulation

Subcategory: Reports/Notices

Software Version/Release: Horizon 7.4

Subject: Need Ability to Choose Pull List Statuses

Proposal: Users need to be able to choose which statuses show in the pull list. It is cumbersome to call Support with each upgrade to have them modify our pull list each time just to add the shelving cart status.

Enhancement#: 4401 (09/06/2005)

Category: Horizon > Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.2

Subject: Automatically Select Email Radio Button When Email Address is Added

Proposal: Automatically update the ``Notice by`` field to select ``email`` when an email address is typed into the ``Addr`` field for the first time when adding a new patron record.

Enhancement#: 4416 (09/30/2005)

Category: Horizon > Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.4

Subject: Group Checkout Counts In Statistical Reports

Proposal: In 7.4, Group Checkouts count each piece of a group checkout as a full circ.

This way of counting is good for sites that use group checkout for uncataloged materials like junk paperbacks, magazines, etc.

However, sites that want to use Group Checkout for materials with pieces that circulate as a package--

kits, audiobooks, cd sets, games, etc.--need to have this count as just one circulation. In our case, our State Library Annual Report guidelines are quite specific: items that circulate as a packaged title should count as one circulation. We have heard that earlier versions of Horizon went back and forth on how group checkouts were counted. Instead of pitting the needs of one group of sites against another, the software should have settings that can accomodate both ways of counting group checkouts.

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Enhancement#: 4452 (11/16/2005)
Category: Horizon > Circulation
Subcategory: Reports/Notices
Software Version/Release:
Subject: Web Reporter
Proposal: Shaun Johnson from the help desk suggested that we request an enhancement to Webreporter so that we can print overdue notices with only 3-5 students per page. Currently, we can only print one student per page or several. We run overdue reports daily at the elementary level and prefer to maintain patron confidentiality through individual notices that can then be sent home for parents to see. I would appreciate any help you can give us with this matter. Please keep us informed.

Enhancement#: 4468 (12/09/2005)
Category: Horizon > Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.3
Subject: Borrower Statistical Classes Should Have Subclasses
Proposal: Say you want to know the number of checkouts by mobile borrowers, by the number of checkouts by mobile borrowers at route 2 of the bookmobile, and the number of checkouts by mobile borrowers at route 2, stop 7 of the bookmobile. The way to do this with Horizon now would be to assign the borrower to three statistical classes, say ``MB`` (for mobile borrowers), ``MB-R2`` (for mobile borrowers on route 2), and ``MB-R2-S7`` (for mobile borrowers on route 2 at stop 7). So we would like to be able to have statistical classes that are parents/children of other statistical classes. So the MB-R2 stat class would be a subclass of the MB stat class and you`d just have to add the borrower to the MB-R2 statistical class to have their checkouts count for a checkout by a mobile borrower, a checkout by someone on route 2 of the bookmobile, and a checkout by a mobile borrower on route 2. And on the stat reports, there would be subtotals by sub-stat classes. (We need these sub-totals and sub-sub-totals to determine which stops on our bookmobile routes are being used the most/least, and whether they`re being used by homebound patrons who couldn`t come down to one of our physical branches or by patrons who are just using mobile for the convenience factor. Mobile services are very expensive to provide, so it is crucial to have this level of granularity to maximize their impact with a limited budget.)

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Enhancement#: 4629 (10/11/2006)
Category: Horizon > Circulation
Subcategory: Reports/Notices
Software Version/Release: 7.3.3
Subject: Hold Notification Blocks
Proposal: I have 3 held items available for cko. The initial message is Hold Notification - Phone, although when that statement was posted, no notification had taken place. The following business day, when TeleCirc had left me vmail, the detail message says Hold Notification - MAIL (Phone Notice Completed). This strikes me as a bit weird; it`s either mail or phone, not both. I`m recommending the following enhancement. When the item is checked in and the hold activated, post a statement Hold Activated or Hold Item Available to the borrower`s burb. When TeleCirc does the

notification, post Hold Notification - TeleCirc. If the library doesn't use TeleCirc and uses mail, post Hold Notice Printed on the day that the hold is added to the notice file. If library staff makes phone calls, post Hold Phone Call on the day the hold is added to the call list. After 17 years on classic Dynix/Horizon, I'm used to the misleading messages about holds that have come up when a library uses TeleCirc because it was an add-on product after the original hold notification setup was coded. But this many years down the road, it seems that it's time to fix it up correctly. As a sysad I may take these things in stride, but new customers and many front-line staff don't.

Enhancement#: 4670 (03/07/2007)

Category: Horizon > Circulation

Subcategory: Reports/Notices

Software Version/Release: 7.3.4

Subject: Web Reporter: Copy # on Items Out & Blocks Reports

Proposal: In Horizon 8.x, we would like to add the Item Copy attribute to Items Out and Blocks reports. Currently that join can't be made without crashing the report. This is critical information for us as K-12 users because we circulate a large number of textbooks and novel sets. Our students need to see the copy numbers on their items out and overdue notices.