

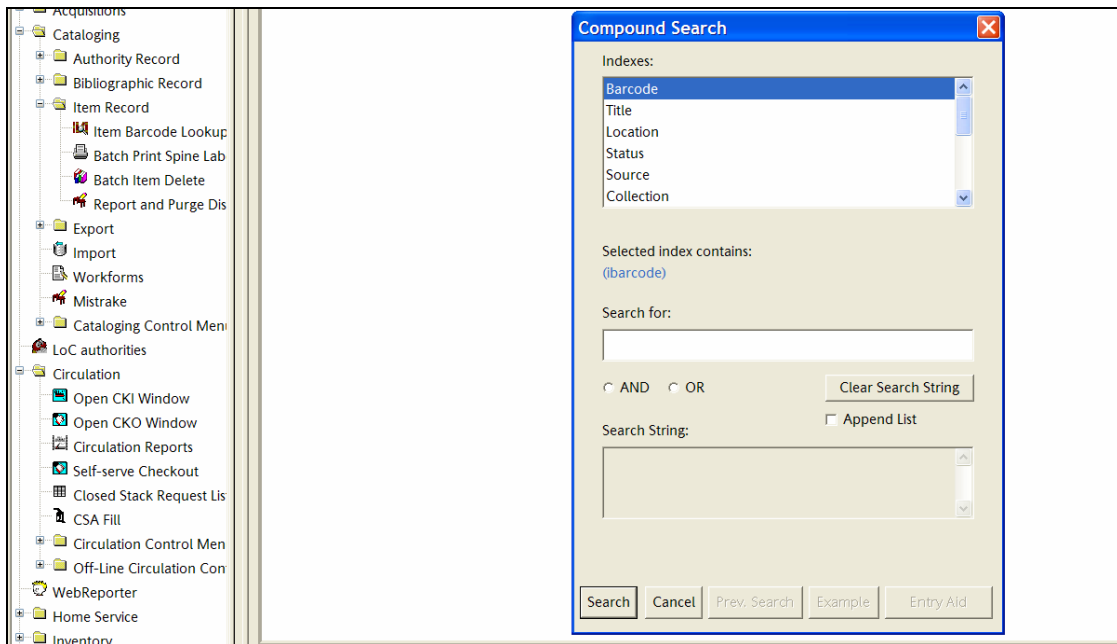
Did You Know Horizon Could Do That??

Presentation by Jonya Pacey

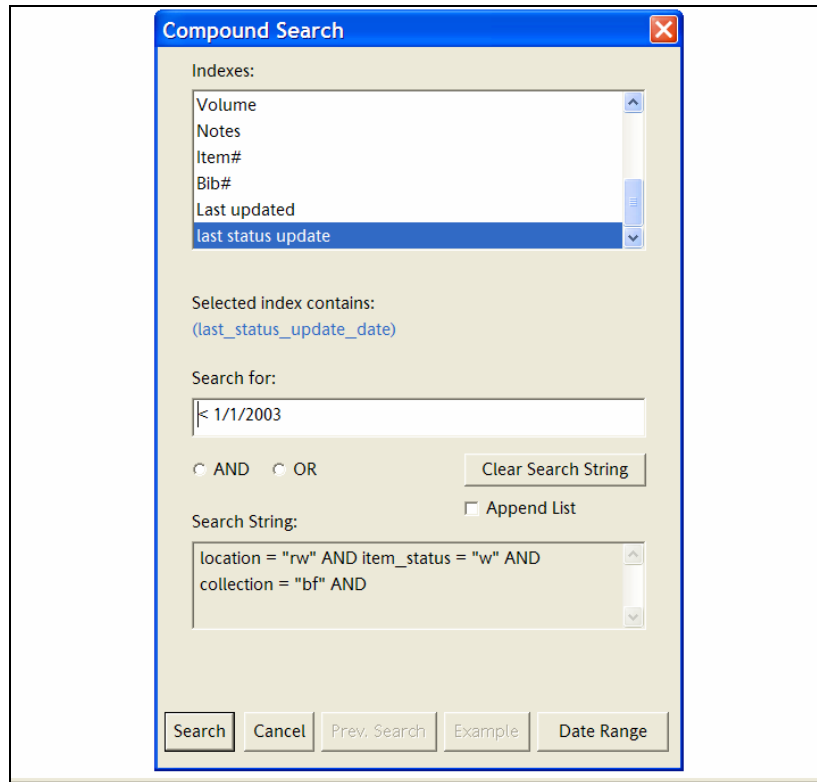
September 9, 2008

Batch Item Deletes

There is a tool within Horizon that will allow SELCO staff to pull together and batch delete items for the Online Libraries. We have to lose the fine control you have when you do them one by one, however it can also save you a lot of time if the items are all findable in a compound search.



1. You should run the Report Missing Inventory Report, which also uses this compound search window, to verify you have the correct search string.
2. Send to the Help Desk the search string that will pull up the list you wish to have deleted. Be specific. It should look like this, containing all applicable indexes you used:
 - a. Location = (fill in the exact text you used in step one to get the correct list of items)
 - b. Item status =
 - c. Item status update date =
 - d. Collection =
 - e. And so on...
 - f. Another option is to send us a screenshot, like this:



3. SELCO staff will delete your items and inform you when the work is done.

Batch Item/Borrower Edits

Similar to Batch Item Deletes, SELCO staff can edit batches of Items or Borrowers.

For Items: follow the steps above to send to the Help Desk an accurate search string.

For Borrowers: Email the Help Desk with the criteria of the set of borrowers you want changed, and what field in their record you wish to change. At this time, we can change the pin number, the expiration date, the btype, the graduation year, the location, and any of the address fields. The Help Desk will be sure of the changes you want made, before making them.

View Changes for Notices for Review and for the Pull List

It was decided during our initial implementation to not allow location-specific customization due to possible confusion during training. We are now allowing Online Libraries to customize their views.

Making changes to the columns of these two windows is possible but does have some cautions. For example, the changes are by location, so all people who use the pull list or the notices for review list will see the same view. If one person likes to sort the columns one way, and another likes it another way, a compromise should be reached internally before contacting the Help Desk.

A second issue is that your resolution may vary from computer to computer in your building, causing the reports to look slightly different. Font size can affect this as well. Printer settings may cause it to be perfect for one printer and wrap inconveniently at another printer.

Pull up a pull list and set the columns as desired. Create a list of the columns in your location's preferred default view and the number of characters for each column. Send this to the Help Desk, and SELCO staff will work with you to assure this is correct and satisfactory.

This is Owatonna PL's original pull list setup:

Call No./Comment	Copy	Collection	Author	Title	Barcode	Pickup
1. 959.7-MA		bnf	Mailer, Norman	The armies of the night : history as a	0101300267685	Zumbrota Public Library
2. 784-PA		bnf	Paredes, Américo	A Texas-Mexican cancionero : folksongs of	0101300150436	Owatonna Public Library
3. E/MA		bfj	Matsuno, Masako	A pair of red clogs /	0101304126556	Southeastern Libraries
4. PB/SF-DI		pbsci-f	Dicks, Terrance	Doctor Who and the talons of Weng-Chiang	0101301029282	Austin Public Library
5. CD/789.43-ME Only owning library		cdm	Memphis Slim	The real folk blues	0101310809898	Southeastern Libraries
6. jFIC/HE		bfj	Herman, Charlotte	Max Malone makes a million /	0101301972366	Owatonna Public Library

This is how I would arrange the pull list:

Call No.	Author	Title	Pickup	Specific
1. 155.232-ST	Stein, Murray B., 1959-	Triumph over shyness : conquering	Northfield Public Library	bib
2. 183-XE	Xenophon	Conversations of Socrates /	Southeastern Libraries	bib
3. 303.66-HI	Hillman, James	A terrible love of war /	Northfield Public Library	bib
4. 378.03-HA	Hall, Colin	Taking time off : inspiring stories of	Lake City Public Library	bib
5. 394.26-ME	Menard, Valerie	The latino holiday book : from cinco de	Owatonna Public Library	bib
6. 728.37-HE		Her home plans : house plans selected by	Albert Lea Public Library	bib

And I would send to the Help Desk this list:

Position 1	Call #	16 characters
Position 2	Author	20
Position 3	Title	20
Position 4	Pickup	25
Position 5	Specific	4

Borrower BTYPE Roll-Overs

We have two tables in Horizon that allows you to control when Horizon will automatically move a borrower from one BTYPE to another. For our public libraries, it is based on birthdate. For our schools, it is based on graduation year. An updated form will be available on line shortly.

Collection Roll-Overs

Similar to the way that Local Request items roll to a new collection and ITYPE after so many days, you can have other collection codes and ITYPES move as well. For example, books from a New Book collection, that has a shorter checkout period, can roll into a longer collection and ITYPE after so many days.

Location:

Original ITYPE	Original Collection Code	Number of Days	New ITYPE	New Collection Code

Bookmarks and Bibliographic Lists

This is a good tool for creating customized lists.

Other topics I would like to cover:

1. Tiers and how to adjust them.
2. Purchase Requests built into Horizon.
3. Notice Intervals
4. Reminder Notices
5. Spine Labels
6. Proxy Borrowers
7. PC Reliance
8. Customizing Receipts
9. Customizing Notice Language
10. Masking Missing, Lost, and Claimed Returned items from the iPAC.
11. Masking your location from showing up as a pickup location on other locations' iPACs.