

Horizon Requests Cheat Sheet

Basic Rule: When in doubt, **check it in** and follow instructions.

1. If you check in a requested book, a message will tell you a) what library to send it to, or b) which of your patrons wants it. A slip may print if you have a receipt printer.

You should either

- a) attach the receipt printer slip to a transit slip or use a transit slip by itself and save for delivery, or
- b) if it is for a local patron, notify your patron and put the book on the hold shelf for them to pick up.

2. If you receive a book with a transit slip in the delivery, you should **check it in**. Returning books will just check in normally. Depending on your Horizon settings, they might not show in the Checkin window. There's a setting in the CKI menu that says "Always show in list" that you can toggle on to allow these to show.

If the book is for a hold, a message will tell you who the book is for, or sometimes will tell you to send it back (if the hold was cancelled).

You should either notify your patron and put it on the hold shelf for them, or send it with a slip to the appropriate place.

3. The hold shelf should be checked weekly for things that have been there over a week. If they have, then **check them in** and follow Horizon's instructions.

4. When your patron comes to get a requested book, check it out to them. If you try to check it out to the wrong patron (on purpose or by accident) Horizon will ask if you really want to do that, but will let you if you do. In that case, the patron who requested it will still be in the queue to get it next.

Pull list – see the "Step by Step Request Pull List" instructions

Do the pull list once every day that you are open.

Placing Requests: see the "Step by Step Requests" instructions

Placing Requests on Enterprise (the online public catalog) – log on and try it by clicking on request button next to any item.

Overdue notices: Run them daily, or as often as possible. It's recommended to run them regularly or they will be out of date. See the "Overdue Notices with Horizon" instructions.