

Horizon

Basic Circulation

**Written by
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Phoenix College Library
Maricopa County Community College District**

**May 2004
(updated 5/17/04)**

Updated 7/07 by Lori Threlkeld

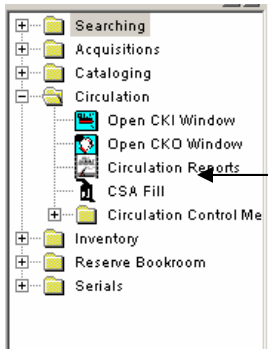
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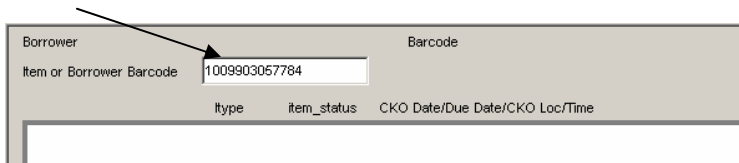
Circulation

Check Out (CKO)

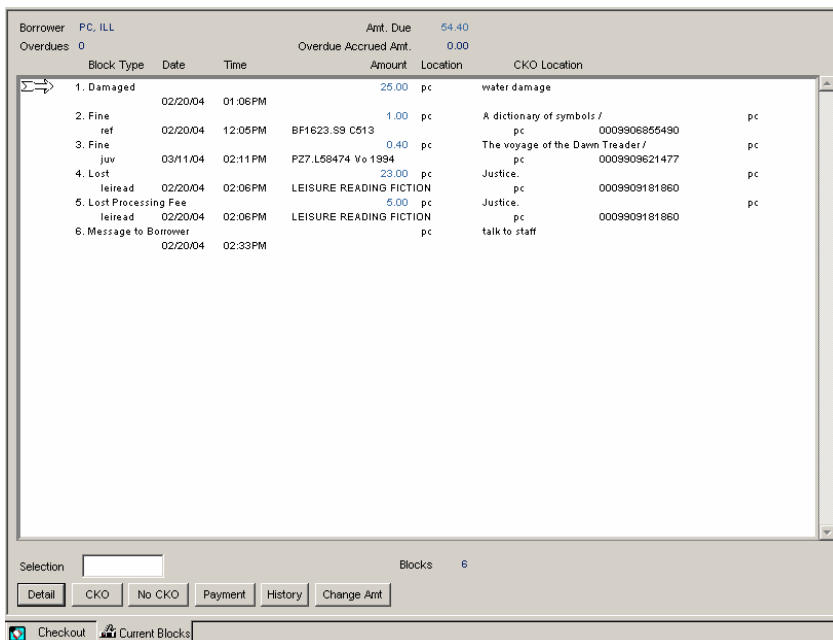
- Click the Circulation folder on the Navigation bar.
- Click Open CKO Window.



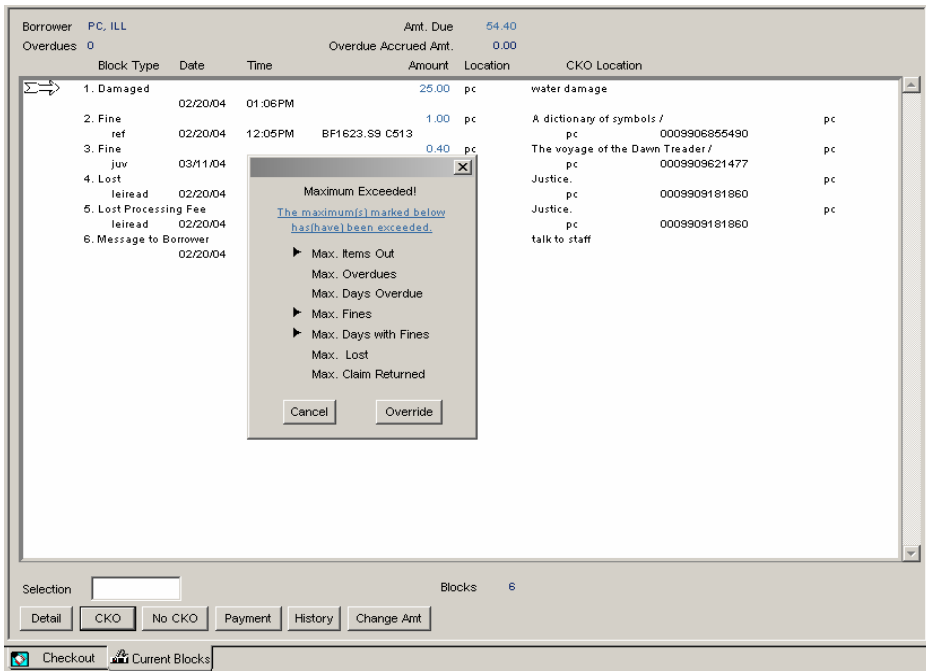
- At the CKO window, enter the borrower barcode (not the item barcode).
If the barcode is unknown, search for borrower by name or SS# (or Student ID#) by pressing F4.



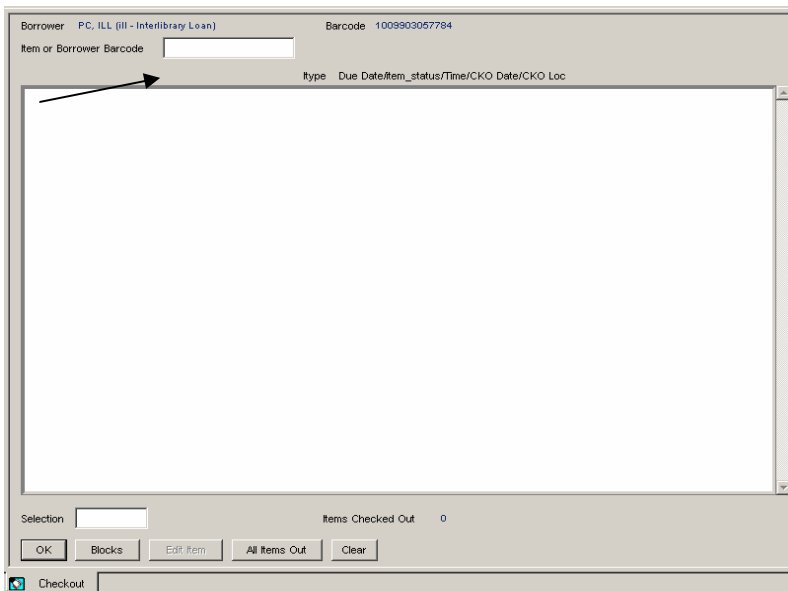
- If the borrower has blocks the block window appears. Blocks may or may not restrict borrower from checking out material depending on type of block and library policy.
 - To discontinue check out, click “No CKO” at bottom of screen and have borrower resolve blocks
 - To continue CKO, click the CKO button.
 - To view details of each block, click the “Detail” button.



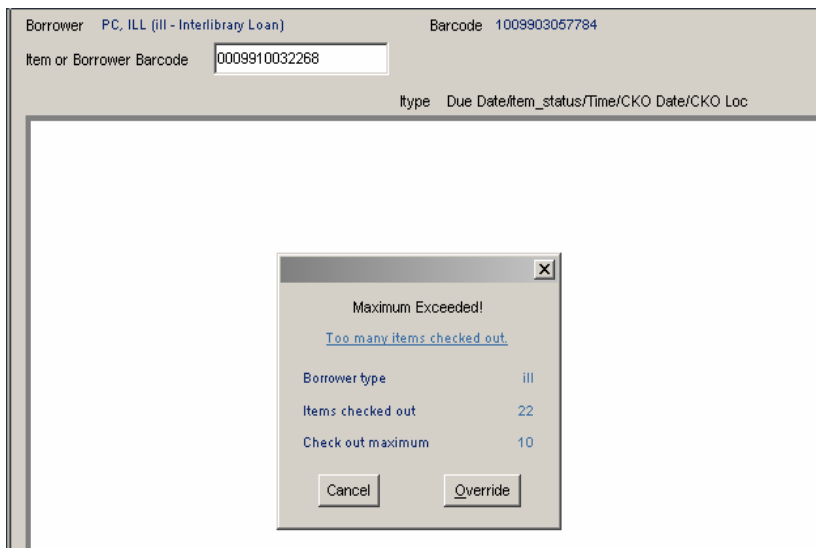
- A Maximum Exceeded screen may appear. It lists what maximums are exceeded. Click Cancel or Override according to library policy.



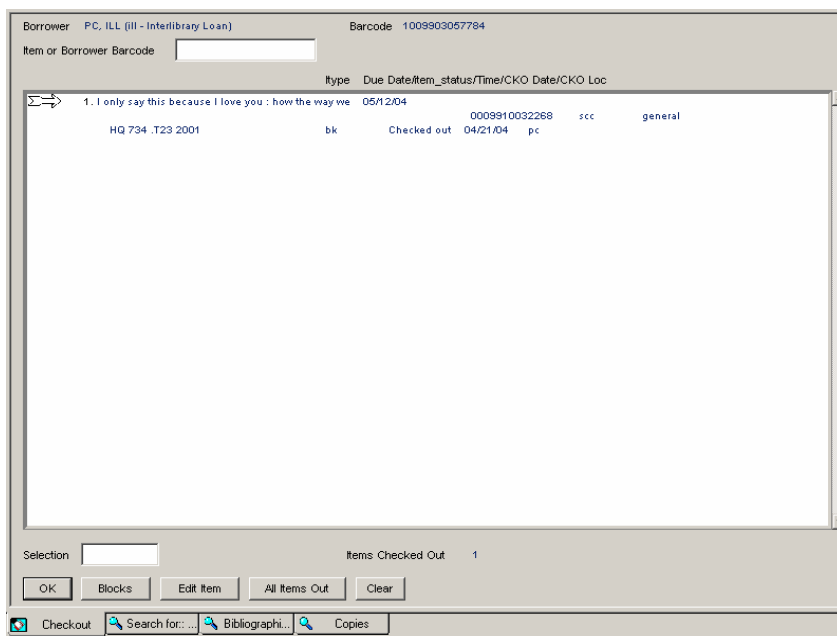
- The borrower screen appears showing borrower name and barcode. The Item barcode may now be entered.



- Additional Maximum Exceeded screens appear noting each specific maximum exceeded. Continue to CKO by clicking “Override” or “Cancel” (depending on library policy).

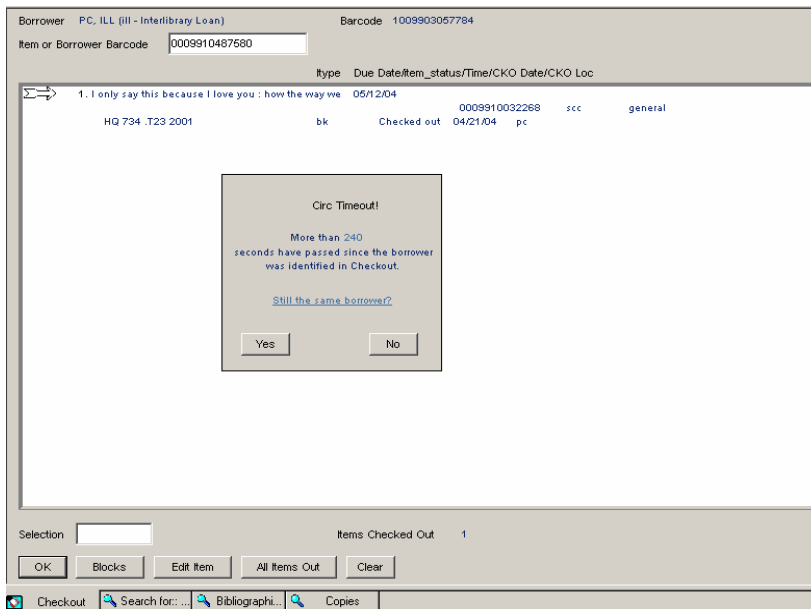


- When the item(s) are checked out the title, due date, item barcode, owning location, collection, call#, item type, status, date checked out, and the check out location are listed.

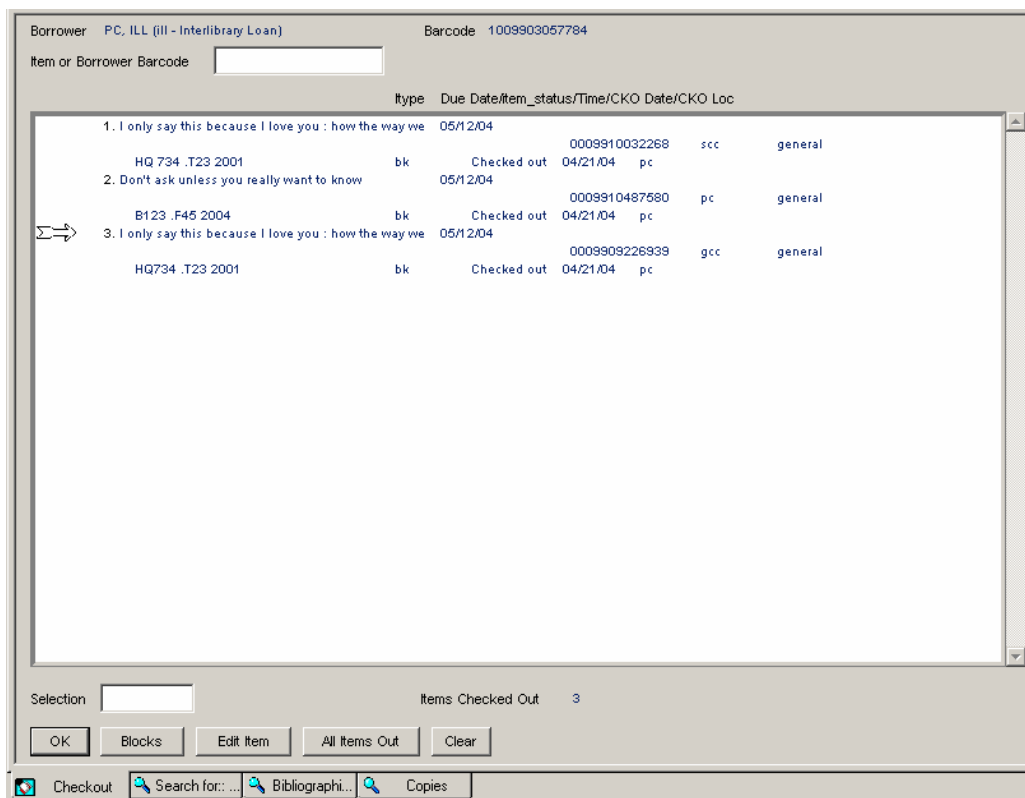


- Date Due slips (single item or multi-item receipts) will automatically print. If they don't, click on File on the Menu bar and click Single or Multi-item slip.

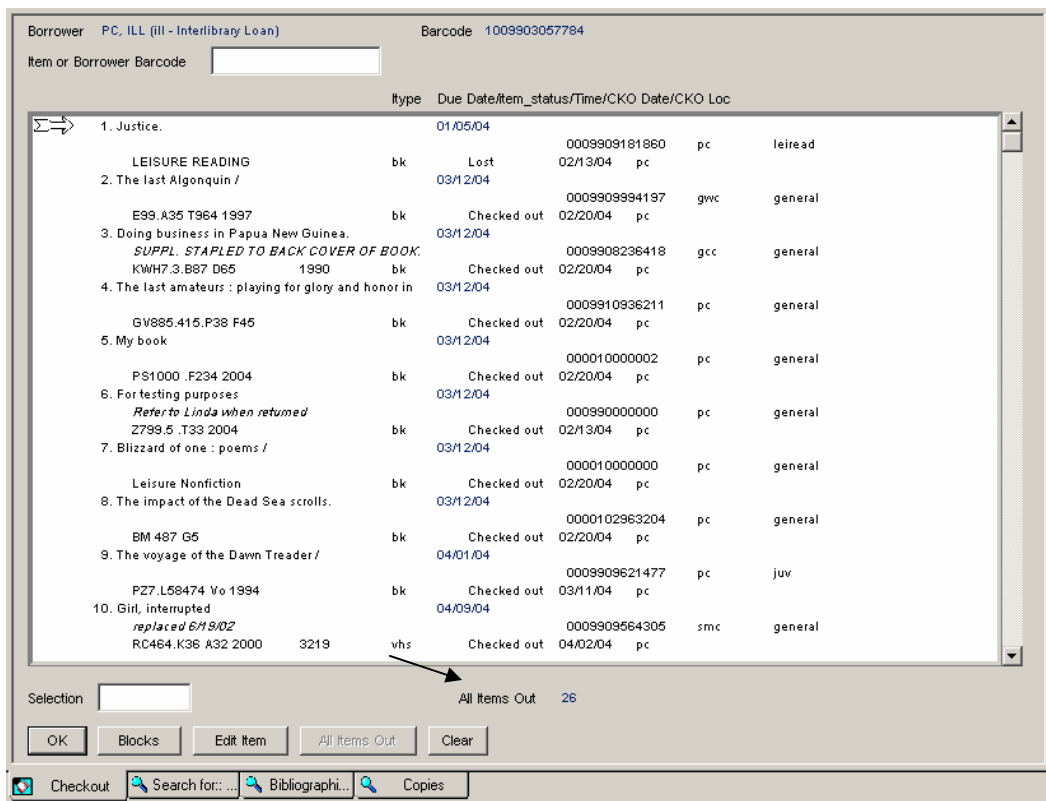
- If the borrower screen stays up over a specified number of seconds (currently set at 240), the Circ Timeout window appears. Click “Yes” if it is the same borrower, and continue CKO, or, No if it’s a different borrower.



- When finished, the number of items checked out during the session is listed at the bottom center of the screen. To view all items the borrower has out, click the All Items Out button at the bottom of screen.

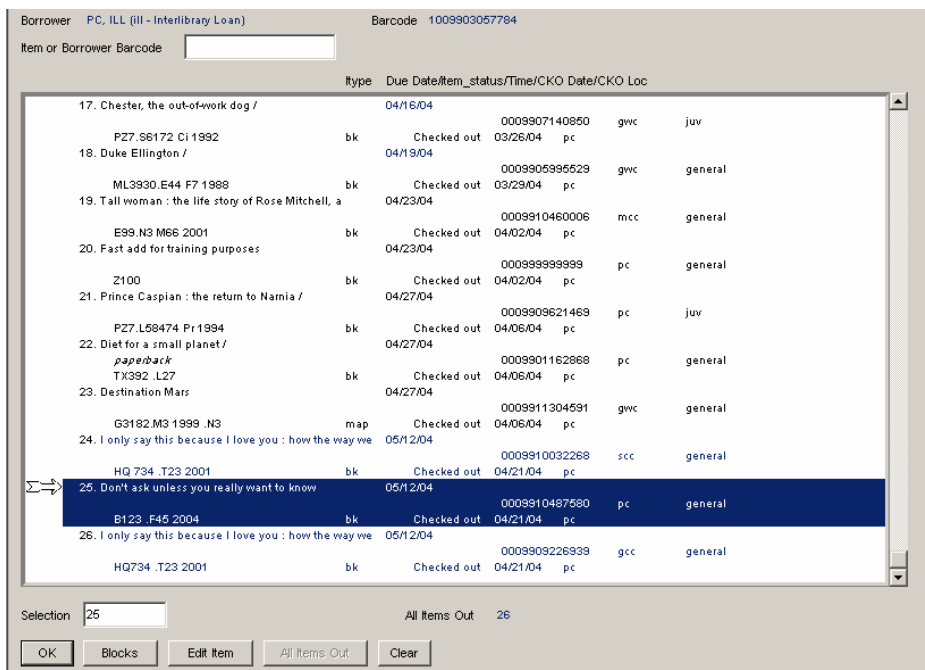


- A list of “All Items Out” is displayed.



Editing Checked Out Items

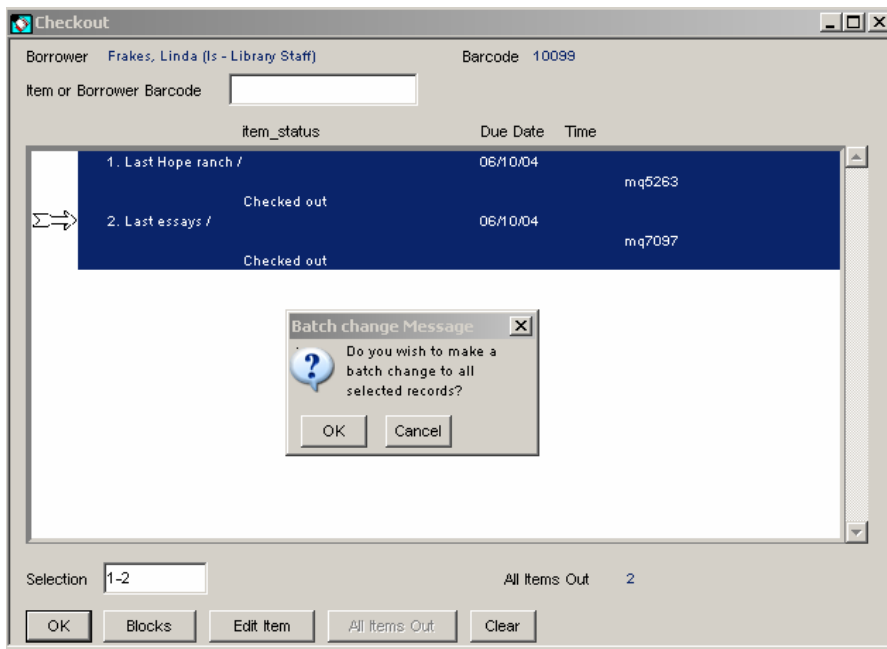
- To edit an item, select the item and click on the Edit Item button.



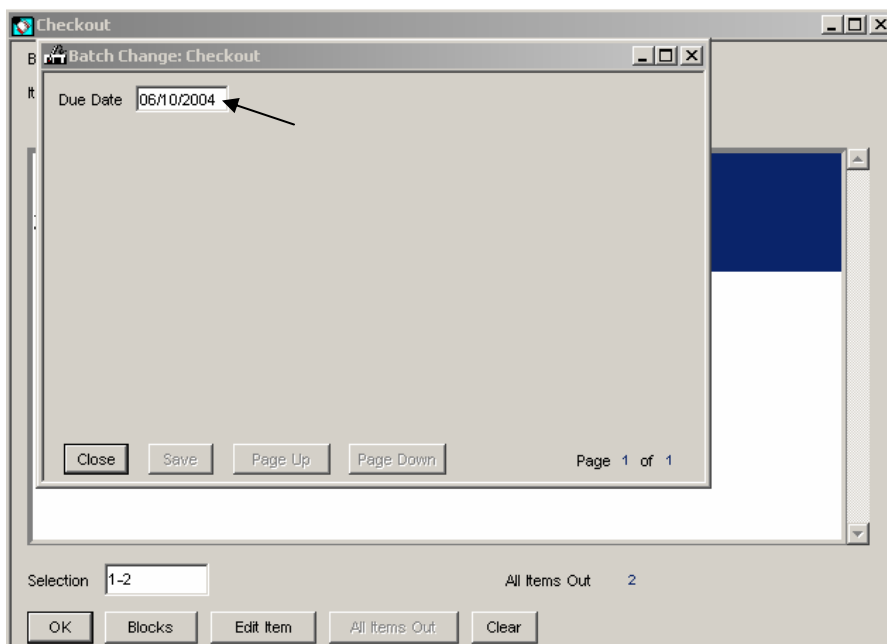
- At the Edit window the Due Date, Due Time can be changed (**not to be used for Renewal**), or Checkin Note can be added.
Click the “Save” button before closing.

- To edit an incorrect due date on more than one item, highlight them by clicking on each to be edited. Then click the “Edit Item” button.

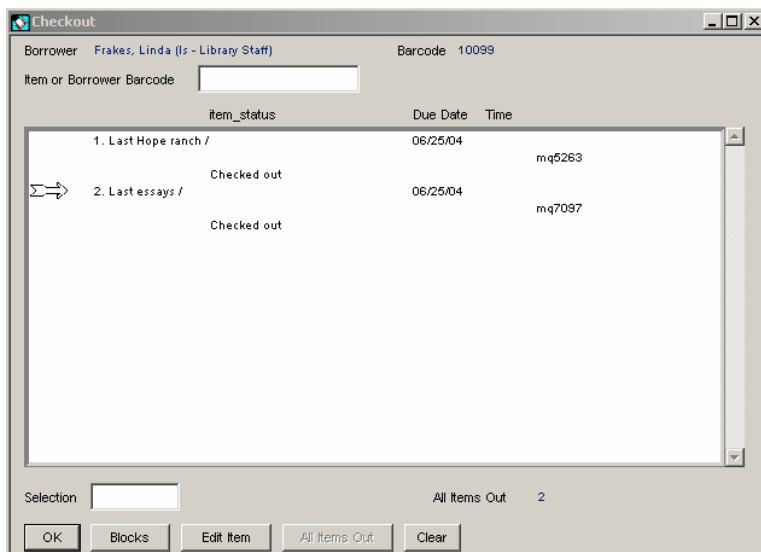
- Click “OK” at the Batch change message.



- Enter a new due date, press Enter or Click “Close”.

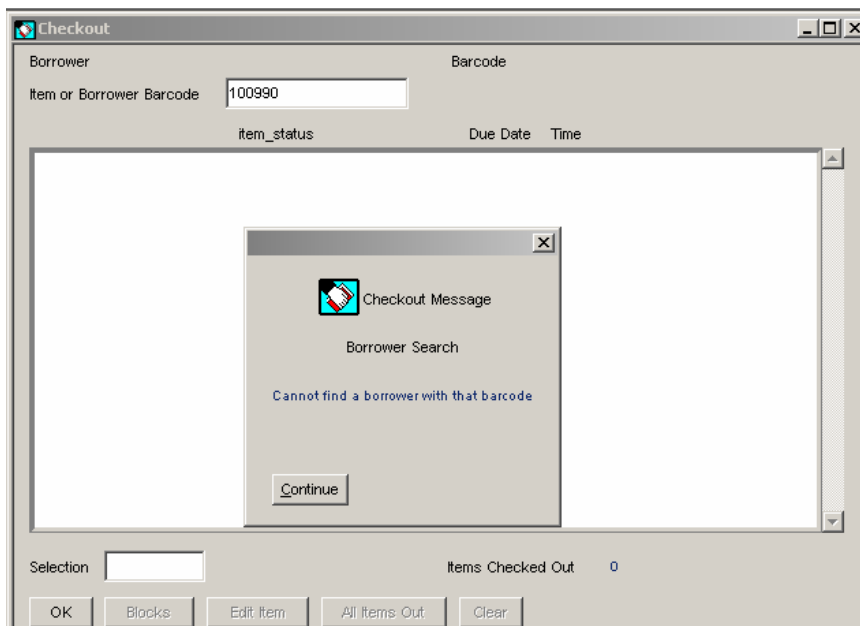


- The new due date is now shown for each item edited.

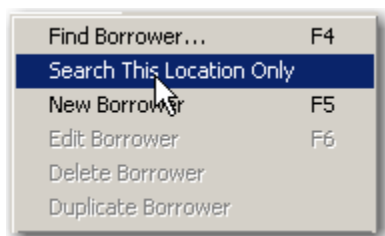


Finding a Borrower Without a Barcode

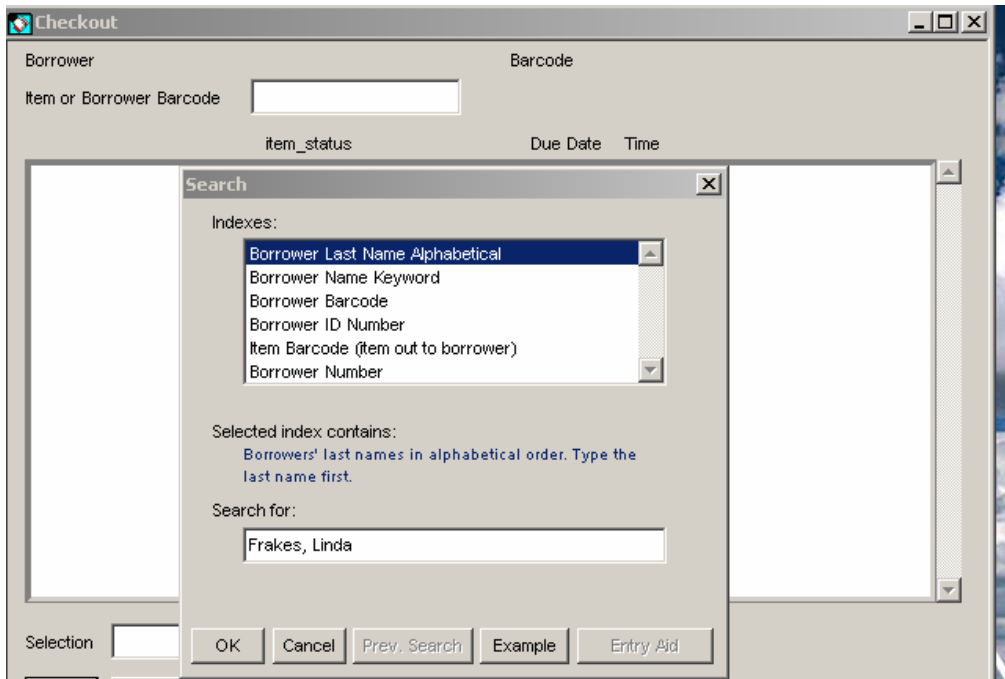
- If no borrower is found using a barcode search, a Checkout Message is displayed.



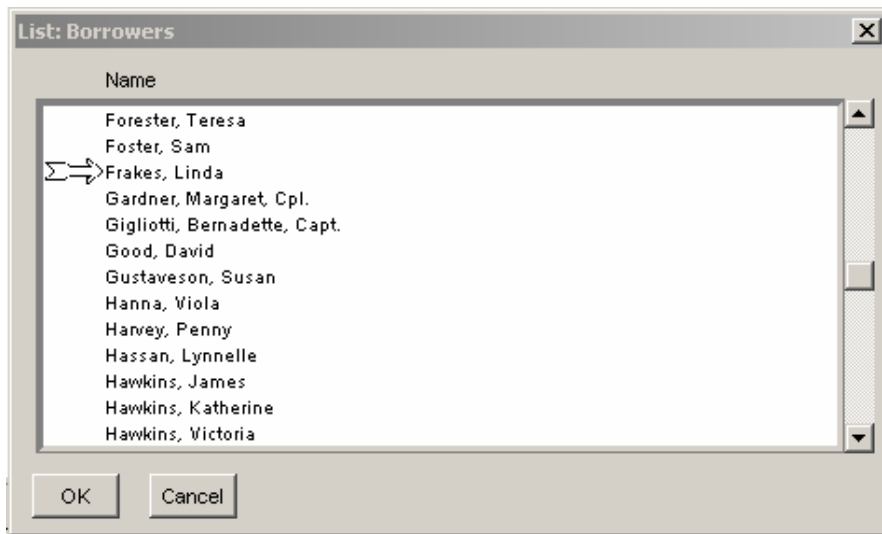
- To do a borrower search, click "Borrower" at the Menu Bar (or press the F4 key).
NOTE: Before entering a new borrower, confirm that "Search This Location Only" is NOT checked (under Borrower on the menu bar).



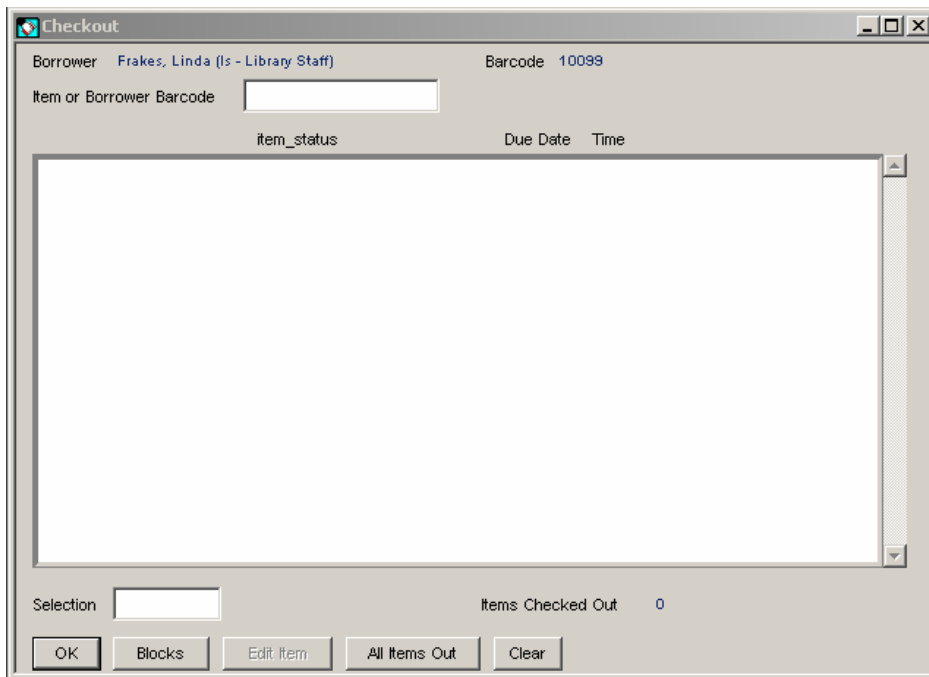
- The “Search” window opens.
Enter borrower Last Name, First name, or SS#, or Student ID# and press Enter or click OK.



- The “Borrower List” window displays the arrow to the name (or the one closest to the specified spelling). If this is the correct borrower, click the “OK” button.



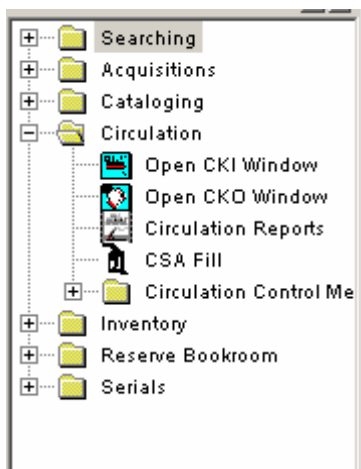
- The borrower record displays in the “Checkout” window.



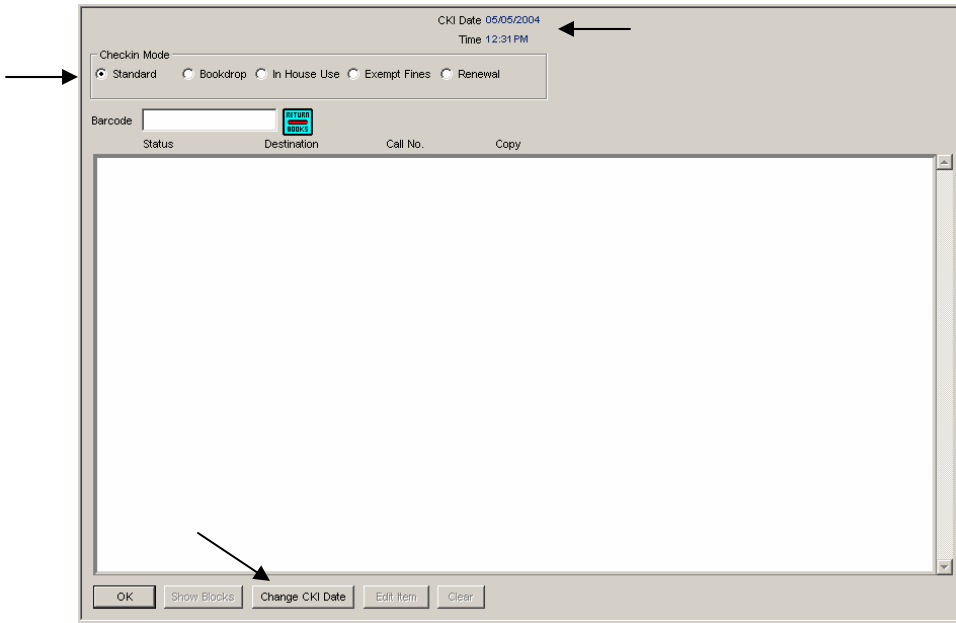
- If no matching borrower appears using Borrower name or SS# indexes, see *New Borrower* (p. 14).

Check In (CKI)

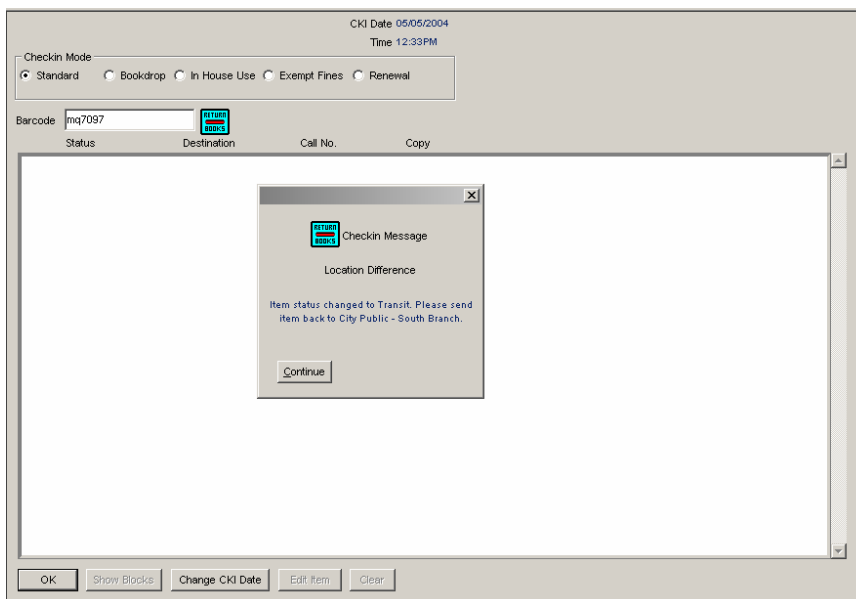
- From the Circulation folder on the Navigation bar, click Open CKI Window.



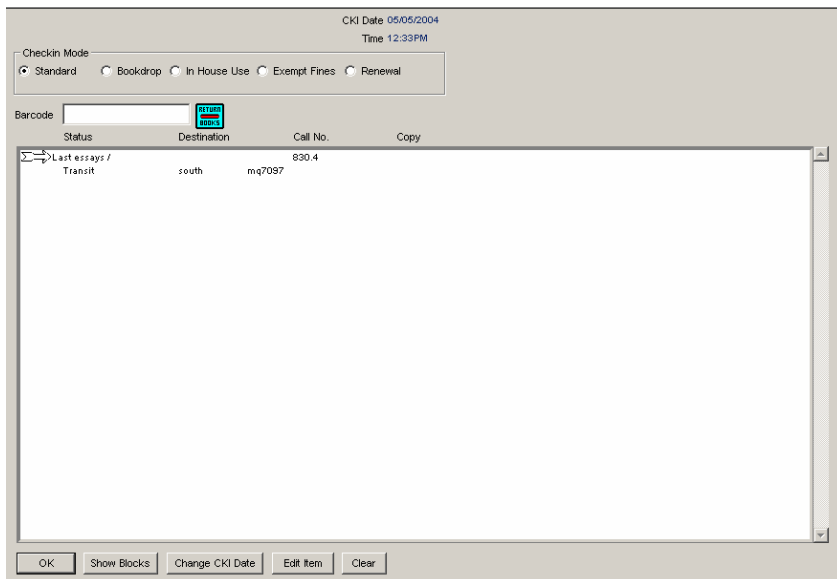
- Select the appropriate Checkin Mode (Standard, Bookdrop, In House Use, Exempt Fines, Renewal). The current CKI date and time display at the top center of the screen. The CKI date can be altered prior to beginning CKI by clicking the “Change CKI Date” button at the bottom of screen.



- Scan the item barcode.
 - If the item belongs to another location a “Checkin Message” appears stating a “Location Difference” with “Item status changed to Transit” and gives the owning location name. Click the Continue button to continue the CKI process.
 - Checkin receipts and In Transit slips print automatically.

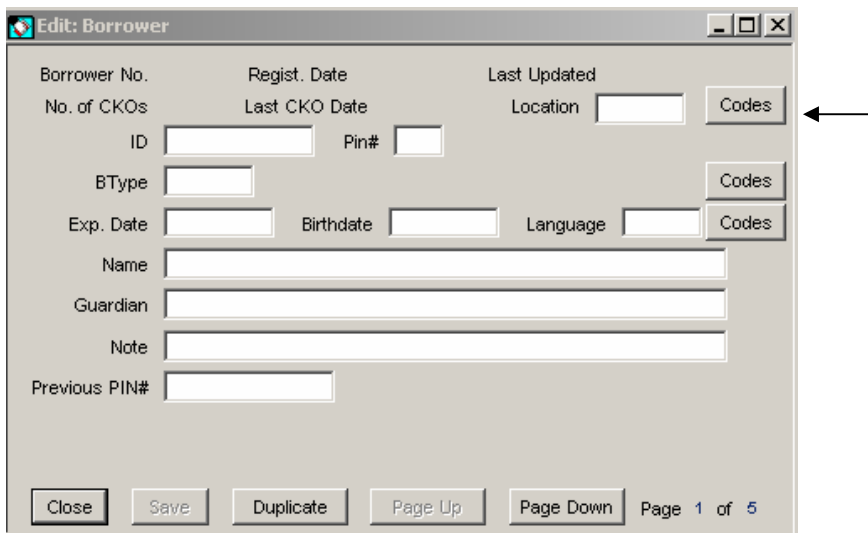


- As items are checked in they appear in the work space and display title, status, destination, call# and barcode.



New Borrower Record

- If there is no borrower record, a New Borrower record may be created. Create a new borrower by pressing F5 or, by clicking “Borrower” on the menu bar.
- The first Edit Borrower window appears (the size of font determines the number of edit windows). Fill out each screen with appropriate information. If a “Codes” button is next to a field, it may be clicked to see what codes are available for that field.



- The gray shaded lines enclosing a section are called Blinks. Blinks may have multiple entries (i.e. phone numbers, barcodes, address, etc.).

Edit: Borrower [Window Title Bar]

Phone (New) 1 of 1

Phone Type

Barcodes (New) 1 of 1

Barcode

Stat Classes (New) 1 of 1

Stat Class

Page 2 of 5

Edit: Borrower [Window Title Bar]

Addresses (New) 1 of 1

Addr. Type Perm Temp. Begin End

Line 1

Line 2

Line 3

Line 4

City, ST

Postal Code Mail Sort Type *Domestic*

Notice By Stnd E-mail

E-Mail: Name Addr.

Page 3 of 5

- For a new borrower record to be active for CKO the Approved box has to be checked. Click Save after all pertinent information has been entered.

The screenshot shows the 'Edit: Borrower' window. At the top, there are 'New' and 'Delete' buttons next to a dropdown menu showing '(New)'. Below this is the 'Access Type' field with a 'Codes' button to its right. The 'Approved' checkbox is checked, and 'Self-Registered' is set to 'No'. At the bottom of the window, there are buttons for 'Close', 'Save', 'Duplicate', 'Page Up', 'Page Down', and 'Page 4 of 5'. An arrow points to the 'Approved' checkbox.

- Material can then be checked out to the borrower.

Edit Borrower Record

- To edit a borrower record, open the borrower record in CKO. In this example, an additional Borrower Barcode is being added to the record since they attend more than one of the MCCD campuses. Click the “Page Down” button until the “Barcode” field appears.

The screenshot shows the 'Checkout' window. Inside, there is a sub-window 'Edit: Borrowers' with the following fields: 'Borrower No.' (85), 'Regist. Date' (05/12/2004), 'Last Updated' (05/12/2004), 'No. of CKOs' (5), 'Last CKO Date' (05/12/2004), 'Location' (cntycc), 'ID' (LindaF), 'Pin#' (empty), 'BType' (ls), 'Exp. Date' (02/05/2007), 'Birthdate' (empty), 'Language' (empty), 'Name' (Frakes, Linda), 'Guardian' (empty), 'Note' (empty), and 'Previous PIN#' (empty). At the bottom of the sub-window are buttons for 'Close', 'Save', 'Duplicate', 'Page Up', 'Page Down', and 'Page 1 of 6'. Below the sub-window, there are buttons for 'OK', 'Blocks', 'Edit Item', 'All Items Out', and 'Clear'. The 'Items Checked Out' count is 0.

- To add an additional barcode, click the “New” button in the Barcodes blink (here the current barcode is 10099).

The screenshot shows the 'Edit: Borrowers' window. The 'Barcodes' section has a dropdown menu showing '10099' and a 'New' button. Below it, the 'Barcode' field contains '10099' and the 'Date Lost' field is empty. The 'Phone' section shows '602-285-7480' and 'Type' 'b' with 'Business' as a label. The 'Stat Classes' section shows 'Library Staff' and 'Stat Class' 'ls' with 'Library Staff' as a label. At the bottom, there are buttons for 'Close', 'Save', 'Duplicate', 'Page Up', and 'Page Down', and a page indicator 'Page 2 of 6'.

- Scan the additional barcode(s) in the “Barcode” field which is now blank.

The screenshot shows the 'Edit: Borrowers' window. The 'Barcodes' section has a dropdown menu showing '(New)' and a 'New' button. Below it, the 'Barcode' field is blank and the 'Date Lost' field is empty. The 'Phone' section shows '602-285-7480' and 'Type' 'b' with 'Business' as a label. The 'Stat Classes' section shows 'Library Staff' and 'Stat Class' 'ls' with 'Library Staff' as a label. At the bottom, there are buttons for 'Close', 'Save', 'Duplicate', 'Page Up', and 'Page Down', and a page indicator 'Page 2 of 6'.

- In this example, two more barcodes were entered. Note that there are now 3 of 3 barcodes. Click on the Drop Down List arrow and all numbers will be shown. Click “Save” when finished.

The screenshot shows the 'Edit: Borrowers' window. The 'Barcodes' section has a dropdown menu showing '(New)' and a 'New' button. Below it, the 'Barcode' field contains '1009902' and the 'Date Lost' field is empty. The 'Phone' section shows '602-285-7480' and 'Type' 'b' with 'Business' as a label. The 'Stat Classes' section shows 'Library Staff' and 'Stat Class' 'ls' with 'Library Staff' as a label. At the bottom, there are buttons for 'Close', 'Save', 'Duplicate', 'Page Up', and 'Page Down', and a page indicator 'Page 2 of 6'. An arrow points to the '3 of 3' indicator in the Barcodes section.

- The Checkout window will be open with the borrower record ready for checkout.