

## Circulation

**Enhancement#:** 173 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Small

**Proposal:** DISPLAY - call numbers displayed on the items when called up under 'all items out'. Also display call numbers on 'request' list. They should display on all requests not just on the 'request pull' list.

**COMMENTS (Per Dynix):** 7.3X; what call number should be used when it's a bib-level request?

**Enhancement#:** 174 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** REQUESTS - Display item barcodes in the circulation reports for 'requests'

**COMMENTS (Per Dynix):** 7.3X; only available on item-specific requests

**Enhancement#:** 175 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** REQUESTS - Present a choice of selecting specific locations or all locations on going into the request list.

**Enhancement#:** 176 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 5.2 Priority: 1 Weight:

**Proposal:** NOTICES - Overdue notices should list call numbers plus the date due and time. Additional flexibility in the wording of the notices needed. (5.2)

**COMMENTS (Per Dynix):** 7.3X

**Enhancement#:** 180 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** DISPLAY - Libraries need the option to mask the social security number on the check in and check out screens

**COMMENTS (Per Dynix):** 7.3X

**Enhancement#:** 183 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Large

**Proposal:** INVENTORY - A way of using the system to do an automated inventory of library materials using a portable barcode reader. the information could be scanned in and then

downloaded in the system. The system would then produce a list of items with a status 'In' that are not on the shelf (ie missing) -- 5.1 Enhancement Request

**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 184 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Small

**Proposal:** SELFCHECK - Self Check out and renewal but with a second level of security for libraries the need this feature. Such as requiring them to use their library ID plus enter a password that the individual assigned to himself.

**COMMENTS (Per Dynix):** [Available with new SELFCHECK software.](#)

**Enhancement#:** 185 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** NOTICES - Libraries that have multiple locations need the option to print notices by the location of the item and not the location of the borrower.

**COMMENTS (Per Dynix):** [Planned for 8.x](#)

**Enhancement#:** 186 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** "INHOUSE - Provide better inhouse statistics by adding an inhouse count to the item record allowing libraries to produce reports on title, collection, copy etc. Combined with ckos, this would provide a better idea of total use."

**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 187 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** DISPLAY - Option to display the btype on the checkout screen. This would let the staff know if the borrower had limited privileges.

**COMMENTS (Per Dynix):** [7.34X](#)

**Enhancement#:** 188 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** BLOCKS - ability to display blocks in priority order so the most important display on the initial screen such as 'do not allow check out'.

**COMMENTS (Per Dynix):** [7.34X](#)

**Enhancement#:** 189 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned

**Proposal:** BLOCKS: Easier access to information blocks on borrowers. Eliminate some of the levels needed to get to the information.

**Enhancement#:** 190 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Gen Rel Release: 4.1 Priority: 2 Weight: Not

Assigned

**Proposal:** REQUESTS - Better reporting of hold request information - list of people with a request for a title - usual question 'how many people are ahead of me on the list' (This is not in 4.1 at the item level)

**Enhancement#:** 191 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Small

**Proposal:** CKI - Would like a beeping sound at the time of check in for items that are overdue.

**COMMENTS (Per Dynix):** 7.3X

**Enhancement#:** 197 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not

Assigned

**Proposal:** DATES - error message or alert if a date edited would be incorrect for checkin or checkout.

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 198 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** REQUESTS - Option to block borrower from placing a request on an item that he/she has currently checked out

**COMMENTS (Per Dynix):** 7.3X

**Enhancement#:** 200 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Medium

**Proposal:** BORROWER - Ability to customize a borrower screen by the library location.

**COMMENTS (Per Dynix):** 7.3X Alternate View

**Enhancement#:** 201 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Medium

**Proposal:** INHOUSE - If an item is not charged out and it is checked in the in-house counter should be incremented

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 204 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Small

**Proposal:** GROUP CHECKIN - Automatic creations of a BURB(note) attached to borrower record when items checked out as a group are checked in and not all items are present.

**COMMENTS (Per Dynix):** [Planned for 8.x](#)

**Enhancement#:** 206 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** RENEWALS - Option to renew a book should be added to the check in window.

**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 207 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Medium

**Proposal:** DATES - ability to change a due date and have the due date apply to the complete checkout session (until new borrower is identified or timed out) Batch edit date dues.

**COMMENTS (Per Dynix):** [Good idea](#); [The batch editing of due dates is available now.](#)

**Enhancement#:** 210 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Medium

**Proposal:** REQUESTS - Alert on check out if another copy of the item is already on the hold shelf.

**Enhancement#:** 212 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "BLOCKS - Want to review more blocks such as payments, waivers, refund, etc., not just those that generate notices. eg 'claimed returned'"

**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 213 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Small

**Proposal:** NOTICES - The full title should print on overdue notices.

**COMMENTS (Per Dynix):** [Good idea.](#)

**Enhancement#:** 214 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** BLOCKS - Ability to clear a patron block when a lost item is returned without having to go through the refund process. Many libraries do not collect money.  
**COMMENTS (Per Dynix):** [Good idea.](#)

**Enhancement#:** 244 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:** 5.2  
**Subject:** Module: CIRC Status: Release: 5.2 Priority: 1 Weight:  
**Proposal:** "NOTICES - if fine amount = \$0.00, do not add information to the notices. We do not charge any fines - having all the references to them confuses people."

**Enhancement#:** 292 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** "ALIAS LOCATIONS - Ability to alias locations together so that a number of locations can circulate on a single workstation logged into one of the locations. For example, enable a library to run both a Main location and a Reserve location in a session logged in as the Main location. A Reserve item would be treated as though the session was logged into the Reserve location (no transits etc). Some sites may wish to link more than 2 locations in this way. -- 5.1 enhancement request"  
**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 293 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** CALENDAR - Ability to set a range of open and closing dates (eg closed 24 Dec to 8 Jan)  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 294 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:  
**Proposal:** "REQUESTS - Ability to decide on pickup location for requests by location. In the case of multiple locations on a single campus, want the ability to say that the pickup location will always be x location, ignoring the location of the borrower. Transit requests will go to the pickup location."  
**COMMENTS (Per Dynix):** [7.3X Available now with Pickup Location Sort \(because you can choose to display or not display each location\)](#)

**Enhancement#:** 295 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:  
**Proposal:** REQUESTS - Ability to delete requests directly from the pull list

**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 296 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** SELFCHECK - Allow a greater range of blocks in selfcheckout

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 298 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** "BLOCKS - Lost items should remain in current blocks, even if no money is owing, until manually resolved or a specified number of days have passed."

**Enhancement#:** 299 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** REQUESTS - Ability to control the maximum requests a borrower can place on a single item by btype

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 300 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** "REQUESTS - Option to stop borrowers making requests at the bib level when there are requestable and loanable items that are ""in"" (with a status of ""i"")"

**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 302 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "REQUESTS - Change cko so that it alerts staff to a request in the same way that cki does, checking if a request is at the bib level or on a specific item. Staff find it very confusing when cko alerts staff to a request on the title, but when the item is put through cki there is no response as the request is on another specific item."

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 303 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned

**Proposal:** "BLOCKS - Where several fines for a borrower relate to one item, all fine information relating to that item should be displayed in one block, preferably in chronological order"

**COMMENTS (Per Dynix):** [7.3X](#) [Can be put together.](#)

**Enhancement#:** 304 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** "BORROWER - In the borrower screen, the current active barcode should appear first, not last in the pulldown"  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 305 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** RENEWALS - Synthesised voice-operated telephone renewals for automatic renewals by patron  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 306 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** TRANSIT - 'Transit' message should indicate which locations the item is moving between. (eg In transit from Central to Law)  
**COMMENTS (Per Dynix):** [Planned for 8.x](#)

**Enhancement#:** 307 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** "DISPLAY - CKI screen should clear after a defined period, as cko does."  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 334 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** "BLOCKS - Hold notices and blocks should show the pick-up location of requests (It now shows in notices in 4.1.1 but it is not clear to users that this is the pickup location, and still needs to be added to blocks)"  
**COMMENTS (Per Dynix):** [Good Idea](#); [think this was part of 7.3x](#)

**Enhancement#:** 335 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:  
**Proposal:** "REQUESTS - Option for recalls to go to the first borrower in the request queue by default, unless a staff member specifically indicates that this recall is for the current borrower."

**Enhancement#:** 336 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**

**Software Version/Release:****Subject:** Module: CIRC Status: Release: 0 Priority: 2 Weight:**Proposal:** REQUESTS - Recalls should be automatically removed when a request is cancelled (the issue date does not need to be set back to the original date). A note should be placed in burb.**COMMENTS (Per Dynix):** Good Idea**Enhancement#:** 341 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned**Proposal:** "ITEM HISTORY - Item enquiry facility - a simple means of checking the recent history of an item - loans, requests, renewals etc"**COMMENTS (Per Dynix):** Good Idea**Enhancement#:** 355 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned**Proposal:** BLOCKS - Option to include a system generated administration fee for 'reordering and recataloguing' which is automatically added when an item goes to 'lost status'. Ability to decide if this fee will be refunded if the item is returned.**COMMENTS (Per Dynix):** Good Idea**Enhancement#:** 356 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned**Proposal:** "BLOCKS - Ability to add a fee when a new borrower is added to the system that will create a block, allow payment and provide a receipt. (For example where a community borrower is charged \$10 for a card) There is a place in the type to show a fee, but it will not bring up a block. Using 'add fee' can lead to errors."**COMMENTS (Per Dynix):** Good Idea**Enhancement#:** 357 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned**Proposal:** RENEWALS - Items set to 'claims returned' should not be able to be renewed. In 4.1.1 they are now in the list of items out and can be renewed inadvertently in a group renewal.**COMMENTS (Per Dynix):** Good Idea**Enhancement#:** 358 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned**Proposal:** BARCODES - An easy way to replace barcodes. Many libraries are rebarcoding on the front of books either for OOS or because the current position of barcodes do not work in self issue machines.**COMMENTS (Per Dynix):** Good Idea

**Enhancement#:** 359 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "BULK CHANGE - Ability to change itype, collection, status (checking circulation), location. etc, by wandng barcodes individually or by creating temporary or permanent files (like CIV in Dynix). Allow a way of creating files in a specific format so libraries can program or use sql for complex selections. Consider implications for libraries that may what to make changes to large batches, eg 100,000 records. Provide exception reports for items that for some reason were not changed."  
**COMMENTS (Per Dynix):** [Planned for 8.X](#)

**Enhancement#:** 360 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** "STATISTICS - Provide two statistics on number of issues for an item, total and from when an zeroing script was run (ie for fiscal or calendar year, or last x years). Provide a similar facility for Reserve book issues, total reserve issues and issues since zeroing script was run (could be for academic year or semester)"  
**COMMENTS (Per Dynix):** [Good Idea](#); [Planned for 8.x](#)

**Enhancement#:** 364 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** BORROWER - Ability to edit borrower record without renewing expired borrowers or dealing with blocks etc. This was lost in 4.1. Often Systems or other staff need to fix or check borrower records for information without having the knowledge or need to resolve circulation problems  
**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 369 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "BLOCKS - Ability to charge a set price for an item, based on collection, even if there is an actual price in the item record, and regardless of when they were checked out."  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 370 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:  
**Proposal:** BORROWER - Allow read only security for borrower records  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 371 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** DISPLAY - Allow borrower 'All item out' list to be sorted  
**COMMENTS (Per Dynix):** [Good Idea](#); [planned for 8.x](#)

**Enhancement#:** 372 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "RENEWALS - When a renewal is done with the book in hand, the 'phone renewal' counter should be automatically reset to 0 (Is there a total renewal?)"

**Enhancement#:** 377 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** BLOCKS - Add checkout date to relevant blocks in current blocks display

**Enhancement#:** 378 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "RENEWALS - Make 'no override' the default when using the renew all function. It is safer not to renew the book if a mistake is made. Also with 'override' being the default, to enforce the circ rules, staff must keep clicking 'no override' whenever a non-renewable book comes up. Hitting enter to take the default is much faster."

**Enhancement#:** 379 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** "CKI - When items are checked in a number of conditions will cause a pop-up box where the operator must hit enter to continue. Some are important (eg in transit), some are not (eg item not charged out). This is a serious problem for large libraries where hundreds of checkins are done at a time. Sites should be able to specify which messages will appear at cki and which do not."

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 380 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** "BLOCKS - Add a sort button to the current and history blocks display that would allow burbs to be sorted by item, block type, date, etc by operator (see also 188)"

**COMMENTS (Per Dynix):** [Good idea](#); [planned for 8.x](#)

**Enhancement#:** 381 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** "INHOUSE - Ability to use a portable barcode reader to do an inventory of items used 'In house' and upload this into Horizon. The system would product a list of items used (title, volume, year, issue, call#, itype etc) and provide daily and monthly statistics."

**COMMENTS (Per Dynix):** [7.3x](#)

**Enhancement#:** 385 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** "REQUESTS - ability to modify display for making requests on PAC. For example, remove the Pickup Location and Comments from the Request window as Circulation staff ignore these and force users to pickup holds from the owing location."

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 404 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned

**Proposal:** "REQUESTS - Display status of an item on the Item Request Queue and the Borrower Request List, eg request been allocated, transit request, transit recall etc. Status should be displayed next to relevant requests."

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 405 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** "FULL RECORD - ability to highlight record/s in circ and see a fuller bibliographic record (possibly by sending record/s to PAC) at any circulation screen including cki, cko, requests, blocks etc."

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 406 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** "NOTICES - ability to determine the notice type by itype for hold notices, eg all hourly loans = phone. Currently the default is based on location or block type (also there is no consistency eg no phone option in block and no email option in location)"

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 407 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** BLOCKS - ability to add larger comment fields when adding blocks to borrower records. At present the character limit is restrictive and some messages become very cryptic.

**Enhancement#:** 422 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** REQUESTS - ability to control requests by location and/or collection. In 4.1.1 itype can be used but this means creating more itypes than required.

**Enhancement#:** 423 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "DATES - ability to define when overnight loans will commence and finish, preferably based on collection. For example, for collection x overnight loans will commence 120 minutes before closing and be due 30 minutes after opening."

**COMMENTS (Per Dynix):** Good Idea

**Enhancement#:** 424 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:

**Proposal:** "ITEM QUOTAS - would like a way of selecting collections and/or itypes which are not included in Maximum items out. For example, users are entitled to 10 items on loan at our Library but we consider hourly loans to be 'special loans' and would like them counted in addition to the limit of 10 rather than within the limit."

**COMMENTS (Per Dynix):** Good Idea

**Enhancement#:** 425 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "CLAIMED RETURNED - when an item with a 'Claimed Returned' status is checked in we would like the ability for the cki clerk to choose whether or not to wipe the fine. At present the system assumes that the user was right and the fine is wiped, but sometimes the borrower was not right (eg they found the book at home after-all) and should therefore pay any fine incurred."

**COMMENTS (Per Dynix):** Good Idea

**Enhancement#:** 452 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "BLOCKS - When a lost item is returned that has been paid for (so the block is cleared), Horizon doesn't have any logic to trigger a refund request (or even to allow the library the option--other than checking by hand to see if they can find the last borrower and any fine they may have paid)."

**COMMENTS (Per Dynix):** Good Idea

**Enhancement#:** 453 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** "BLOCKS - When an overdue item is marked lost or claims-returned, the accrued overdue fine is simply ignored. Should have the ability to either charge the fine (if it was lost, why didn't they tell us sooner?) or to waive it based on a configuration."

**COMMENTS (Per Dynix):** Duplicate

**Enhancement#:** 458 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned

**Proposal:** BORROWER - provide an option in Webpac for borrowers to change their own password. Allow libraries to control all places where the password will display.

**COMMENTS (Per Dynix):** 4.0 in HIP

**Enhancement#:** 459 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Gen Rel Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** DATES - a optional 1 day itype which will have a due date equal to the date it was issued. The due time should be able to be set by each library as either a fixed due time (eg 10pm) or a due time calculated according to the location's calendar (eg 15 minutes before the location closes). (At present an item with itype 1 Day is due back the following day - we would like some collections to be due back at the end of the day of issue.)

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 460 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** RECALL - an acknowledgement when a recall has been successfully made (eg 'Item now recalled'). At present once you have selected the borrower the information just disappears from the screen.

**Enhancement#:** 461 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "RENEWALS - when the maximum number of renewals is reached, Horizon should notify staff of the total number of renewals left for the borrower (eg both Renewals and Phone Renewals). While a borrower may have reached the maximum number of Phone Renewals they may still have non-phone Renewals left and at present this is not obvious."

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 462 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned

**Proposal:** ADDRESS CHECK - ability to set an address check on an individual that works that same way as the Address Check set in btype (eg opens the Address Check window with the borrower's record is opened in cko). This would be a clearer alert than the acr (Address Check Block) currently available given that blocks are not able to be sorted in priority.

**COMMENTS (Per Dynix):** 7.3X can sort blocks.

**Enhancement#:** 464 (11/18/2003)

**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** "GROUP CHECKIN - When only some parts of a group checkin are returned, the record should stay in 'All items out'. Each part should be individually identified in the item record. The outstanding part/s should then generate overdues, recalls, fines etc."

**Enhancement#:** 466 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "BLOCKS - Add 'view blocks' to the 'maximum dialog box'. This would allow someone with appropriate privilege to see the blocks and tell the borrower what books they have overdue, without allowing them to go to CKO. To get to CKO they would need to use override."

**Enhancement#:** 467 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** REQUESTS - add recall reason to recall blocks and notices  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 469 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** BORROWER - increase the window size of the borrower edit screen. Libraries would like to put the address on the first page but the blink is too big to fit easily with borrower# etc. Also libraries with custom fields in the address have problems fitting the fields into the available space even on a separate page.  
**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 482 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** NOTICES - Ability to select and process a partial batch of notices. (eg when reprinting notices)  
**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 483 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** REQUESTS - Ability to delete a recall without having to checkin and re-checkout the item

**Enhancement#:** 484 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**

**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** REQUESTS - ability to have different reasons (codes) for cancelling requests  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 485 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** REQUESTS - ability to add a note on a recall notice and on a request cancellation notice  
**COMMENTS (Per Dynix):** [Duplicate](#)

**Enhancement#:** 486 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** BORROWER - In CKO a screen appears if the borrower expiration date has expired. It gives the option to renew the expiration date and other info. Not included is the address field. If this was added it would give another way to update and check addresses  
**COMMENTS (Per Dynix):** [Need to test](#)

**Enhancement#:** 487 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** BORROWER - Ability to have a separate expiration date for proxy borrowers  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 488 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** BORROWER - ability to add a photo id to a borrower record.  
**COMMENTS (Per Dynix):** [8.0](#)

**Enhancement#:** 489 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** NOTICES - option to generate a notice when a Lost or Missing item is found

**Enhancement#:** 490 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** INVENTORY - Ability to scan all books in a borrower's office and update the circulation records.

**Enhancement#:** 491 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "INVENTORY - Ability to nominate which statuses should be in the collection. Normally i and s, but may want to inventory the In Process shelves and be told if items with incorrect status are present as well as items with that status missing. These may not be in classified order."

**Enhancement#:** 492 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "INVENTORY - Misshelved report, identify different collections, locations, statuses, items not in the catalogue, and out of place n numbers of books on either side. Flexibility to decide what options are in each category."

**Enhancement#:** 493 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "INVENTORY - Lost or missing books, need some way of notifying library staff of these. Option not to set these back to 'In' automatically as many libraries need to make decisions on fines etc."

**Enhancement#:** 494 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** INVENTORY - ability to use a PC or laptop to inventory collections

**Enhancement#:** 495 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** INVENTORY - Ability to handle non-barcoded collections by producing shelf lists (electronically in laptop file?)

**COMMENTS (Per Dynix):** 7.3X

**Enhancement#:** 496 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "INVENTORY - ability to handle non classified collections, for example fiction which is often in author order."

**Enhancement#:** 502 (11/18/2003)

**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** DATES - Ability to set a final due time for the day for material on hourly loan that is not able to leave the library. Currently if it is a 2 hour loan it will issue to the next day less than 2 hours before closing.  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 503 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** REQUESTS - Option to allow borrowers to recall items from PAC. Some libraries only charge fines for recalls and allow borrowers to keep material for long periods unless wanted by another person.  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 504 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** CKO - Have the CKO window clear the last borrowers transactions and close the record after a certain amount of time

**Enhancement#:** 508 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** CKO - Display total number of items out at the bottom of the cko screen. Libraries cannot agree which total they want so the option should be to display both (eg All items out 20 Current session 0)  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 509 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** DISPLAY - Function keys to minimise the CKO and CKI windows.

**Enhancement#:** 527 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:  
**Proposal:** RENEWALS - rewrite 'renewmon' so that it runs on the server and can be started via a cron job. Sites that reboot their servers at night to run dbcc or do backups need to be able to restart 'renewmon' easily unsupervised and servers are more reliable.  
**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 549 (11/18/2003)  
**Category:** Circulation

**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned**Proposal:** BLOCKS: Display fines generated in a renewal on the screen as they happen. Currently staff have to remember to open up Current Blocks at the end of the transaction. Also display fines in the WUI for self-renewals.**Enhancement#:** 550 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: None Release: 0 Priority: 0 Weight: Not Assigned**Proposal:** "DAYEND: The number of days that the system takes to set items at 'shelving' status to 'in' is governed by a field in the location table. If this is set to 1, the items are not reset to 'in' until the second dayend is run. If the number of days is set to 0 the status goes straight to 'in'. Could this be changed so that 1=first dayend, 2= 2nd dayend."**COMMENTS (Per Dynix):** [Good idea](#)**Enhancement#:** 553 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: None Release: 0 Priority: 0 Weight: Not Assigned**Proposal:** "Invoice generation - when invoices are generated through Circulation Reports (in a batch), invoices are only created for the blocks defined in borrower\_invoice\_criteria. But when invoices are generated for individual users in Circulation the borrower\_invoice\_criteria is ignored (eg all outstanding blocks are included on the invoice). All invoices should be generated in accordance with the borrower\_invoice\_criteria."**Enhancement#:** 554 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned**Proposal:** RECALL - ability to set a separate grace period for items that have been recalled (eg a circulation\_privilege 'Recall Grace Period')**COMMENTS (Per Dynix):** [Good idea](#)**Enhancement#:** 555 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:**Proposal:** REQUESTS - When the Request Pull list is generated the fill\_location and fill\_date should not be automatically entered in the request table (as the request can then only be filled by an item with the same home location as the fill\_location).**Enhancement#:** 556 (11/18/2003)**Category:** Circulation**Subcategory:****Software Version/Release:****Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:**Proposal:** REQUESTS - should not include items with a non-requestable itype.**COMMENTS (Per Dynix):** [7.3X](#)**Enhancement#:** 557 (11/18/2003)

**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:  
**Proposal:** Requests - checking out one copy of the title (eg volume 1) should not be deemed to fill the item specific request on another copy of the title (eg volume 2)  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 558 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "Requests - Non-requestable itypes should not be able to fill a request made at the bibliographic screen. For example, the user wants a 14 day loan of a textbook which is out on loan and places a request. He decides to have a preliminary look at the text so takes out the 3 Hour Loan copy. When the 3 Hour Loan copy is CKO to him his request on the daily loan is deleted."  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 604 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** NOTICES - Option to select and print notices by btype

**Enhancement#:** 608 (11/18/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** REQUESTS : option by location for Hold shelf to include or exclude holidays and closed days when calculating the expiry date for the hold. [Jan 2000]  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 610 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** ITEM EDITOR General Idea The library would like a means of managing its items in a fast and efficient manner. Unlike the Bib Editor (Cataloging), libraries often need to move, delete, identify items in their libraries. These changes often include hundreds and thousands of items at a time. Realizing the time consuming process of redesigning an existing module, the library is proposing a new module: THE ITEM EDITOR. The item editor should be designed for speed and flexibility. 3 COMPONENTS OF THE ITEM EDITOR UPDATING ITEMS This management includes the ability to change item types, item statuses, collection codes, item notes, location, etc.. Naturally, using this item editor in a batch mode, the library should be able to scan items, similar to checkin, to a new status, collection code, or item type with the speed of checkin services. Additionally, the item editor should be able to accept input from a portable scanner or a text file of barcodes. DISCARDING ITEMS This management includes the ability to discard items with the ability to discard associated bibs if no other items are attached. Naturally, using this item editor in a batch mode, the library should be able to scan items, similar to checkin, to discard with the speed of checkin services. Prompting whether you really want to discard this item should be optional (Enabled or Disabled) Additionally, the item editor should be able to accept input from a portable scanner or a text file of barcodes. INVENTORYING ITEMS This management includes the ability to inventory items from library collections. Librarians should be able to

initiate a collections inventory and finish inventory from a management screen. Naturally, using this item editor in a batch mode, the library should be able to scan items, similar to checkin, to inventory with the speed of checkin services. Additionally, the item editor should be able to accept input from a portable scanner or a text file of barcodes. With each upload, users should be able to print a PROBLEM ITEMS REPORT (lte

**COMMENTS (Per Dynix):** Covers a couple of different enhancements.

**Enhancement#:** 611 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:

**Proposal:** "BORROWER : currently if the btype or location is changed in the borrower record, the expiry date is automatically updated, losing the original date. The expiry date change should be optional."

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 612 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** TRANSIT HOLD SLIPS : Horizon will print a transit\_slip if the item is going back to the branch that owns the item or if the item is going in transit to fill a request. Want the ability to print this slip only when the item is going in transit to fill a request or recall.

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 619 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** REQUESTS - Allow staff to recall an item for a person with an existing request without recreating the request.

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 620 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** REQUESTS - Allow automatic recalls based on location and time out.

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 621 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 3 Weight:

**Proposal:** REQUESTS - Generate a block on the borrower record when a user deletes a request from PAC; block should indicate that user has deleted the request via PAC

**Enhancement#:** 630 (11/20/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: Release: 0 Priority: 0 Weight:  
**Proposal:** Ability to restrict add/edit/delete access to specific subfields of a bib record within the Cataloging module  
**COMMENTS (Per Dynix):** [This is a cataloging request available in 7.3X](#)

**Enhancement#:** 631 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** REQUESTS : Ability to change the item status at checkin (eg or mending or cataloging) without triggering a hold for the next person in the request queue  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 632 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "DAYEND : If you run dayend for the current day, a block for an item due that day does not appear until dayend runs again 24 hours later. This is misleading for staff and users alike "  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 633 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** "DAYEND : ability to run parts of dayend more frequently, for example create overdue blocks hourly for material out on hourly loan"  
**COMMENTS (Per Dynix):** [7.3X, Any day end section may be run on demand.](#)

**Enhancement#:** 634 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 2 Weight:  
**Proposal:** "REQUESTS : Ability to recall an overdue item and have different fines, grace periods, notices etc apply"  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 635 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: ACQ Status: Release: 0 Priority: 3 Weight:  
**Proposal:** Create workslips for catalogers on receipt of material. Include the following data: Distribution (branch or department and how many copies to each) Collection (reference, circulating, Popular Books, etc.) and how many copies to each. Requests (so that items with requests can be prioritized for processing) Horizon bib number (so that OCLC records can be matched at point of overlay - the last step in our process) ISBN (so that we're sure we're dealing with the item we thought we ordered) Price (handy sometimes) Fund codes (often helpful if there's no other information)  
**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** 636 (11/20/2003)

**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** BLOCKS : Once a 'claimed returned' item is returned to the library, the block on the borrower record goes directly to the borrower's history. There is no indication that the claimed returned item was found so that the staff member knows to tell the borrower when they come back to the library. We would like to request an enhancement for a new block to automatically generate when a CR item is found and pop up the next time the borrower's record is accessed.  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 637 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** BORROWERS : Option to display a borrower's blocks before renewing their record.  
**COMMENTS (Per Dynix):** [7.3X , Can do that by CKO without renewal.](#)

**Enhancement#:** 638 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:  
**Proposal:** CKO : If an expired card is not renewed the checkout date must be confirmed as is for each item checked out. Provide an option to have a session setting input once for all items checked out to that particular borrower.  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 639 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** BORROWERS : Provide an option to set the borrower expiration date to a specific date instead of a number of days.  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 640 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:  
**Proposal:** BLOCKS : Ability to turn off the 'transit checkin' block. Libraries can checkin hundreds of these a day per location.

**Enhancement#:** 641 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** BORROWER : Option for the borrower's PIN number to default automatically to the last four digits of their phone number

**Enhancement#:** 642 (11/20/2003)

**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:  
**Proposal:** REQUESTS : Option to manually change the pickup location of a request  
 after the request has been made.  
**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** **643 (11/20/2003)**  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: Release: 0 Priority: 1 Weight:  
**Proposal:** REQUESTS : Option to manually change the expiration date on a  
 request  
**COMMENTS (Per Dynix):** [7.3X](#)

**Enhancement#:** **644 (11/20/2003)**  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: ACQ Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** RENEWALS : Option to renew items based on the dates of the checkout  
 location not the owning location.

**Enhancement#:** **656 (11/20/2003)**  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** Add MARC Holdings Format cataloging support  
**COMMENTS (Per Dynix):** [8.0; Cataloging Enhancement](#)

**Enhancement#:** **657 (11/20/2003)**  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** Develop a sharing code so that prediction patterns others have already  
 created can be utilized as new users build the serials records  
**COMMENTS (Per Dynix):** [7.3; Serials Enhancement](#)

**Enhancement#:** **658 (11/18/2003)**  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "NOTICES - epixtech to provide a method, setup and support for  
 emailing notices."  
**COMMENTS (Per Dynix):** [7.3](#)

**Enhancement#:** **659 (11/18/2003)**  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** CKO : Ability to globally transfer loans from one borrower to another

**Enhancement#:** 660 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** CKI : Option to customise what data will display when show borrower is turned on.

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 661 (11/18/2003)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: CIRC Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "BLOCKS : Ability to change the fine amount charged after a certain number of days. (eg 10c/day for 7 days, then 25c/day)"

**Enhancement#:** 3552 (01/04/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Renewals Via the CKO Screen in Circ

**Proposal:** If we want to renew several items (from the CKO screen) and 1 or more of the items is on hold for someone else, Horizon gives you a message to indicate that one of the items you are renewing is on hold for borrower \*\*\* however, it does not specify which of the items you are renewing is on hold. Can the message be modified so that it clarifies which item the message relates to (eg. include the items title, perhaps barcode)?

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 3558 (01/08/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Exempt Checkin Needed

**Proposal:** Add the ability to checkin items exempt from charges using PCReliance. We need this for our bookmobile operation since we do not charge overdue fines for any items checked out from and returned to the bookmobile. The items checked out may or may not be owned by the bookmobile and our circ parameters follow the owning location rules.

**COMMENTS (Per Dynix):** Good idea

**Enhancement#:** 3565 (01/15/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:** Dynix 191.11

**Subject:** jdpcrel process improvement

**Proposal:** For years, we were able to upload PCRel data files to our Dynix server via the "set it and forget it" guidaemon process. When we upgraded to the jdpcrel daemon recently, we expected it to be an improvement upon its predecessor. But jdpcrel is more high-maintenance than the guidaemon. Please replace the jdpcrel daemon with a better service, or improve it. Reboots of our InfoPortal server create jdpcrel Dynix logins to each of our 24 CIRC accounts. The jdpcrel process should not autostart on reboot and login to Dynix to hog 24 user licenses - especially when no PCRel uploads are in progress.

Dynix support has suggested that, to prevent these superfluous logins on reboot, we change the password of the jdpcrel user to an incorrect one. Then, when we have PC Reliance files to upload, we

correct the jdpcrel password to allow uploads. Another option suggested that we edit the telnet.cfg file in the jdaemon directory to change the "active" setting to "false" for our 24 CIRC accounts. Then, to upload PC Rel files, edit "active" back to "true" in all CIRC accounts. These workarounds make PC Rel uploads significantly more tedious with the jdpcrel process.

The current design of jdpcrel needs refinement, before it can be called an "upgrade" to the guidaemon.

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 3585 (02/03/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:** 7.2

**Subject:** Outputting notices to the screen

**Proposal:** Please set up a simple facility so that notices can be output to the screen as well as the printer.

**Enhancement#:** 3597 (02/04/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:** 7.3.1

**Subject:** Pull List Dates

**Proposal:** The pull list should show the date the item was placed on reserve by a patron.

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 3609 (02/05/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:** Horizon 72.1.178.gCJK

**Subject:** Horizon72 CJK-Auto email notice for request, overdue and other information

**Proposal:** We hope that horizon can provide auto email notice for request, overdue and other information

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 3620 (02/10/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:** 7.3.1a

**Subject:** Counting Group Charge as check outs

**Proposal:** In Dynix, when you set an ltype to be a "group charge" you got a message that popped up when you checked it out asking how many pieces were in that item. When the item was checked in, you got the same message.

The same is true in Horizon.

In Dynix an item with 2 pieces would increment the number of checkouts by 17, not just 1.

In Horizon, the number of "checkouts" is counted as 1, no matter how many pieces.

We want multi part items with a single barcode to increment the number of circulations by the number of pieces, not just a single circ.

**COMMENTS (Per Dynix):** [7.4](#)

**Enhancement#:** 3659 (02/20/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:** 7.24

**Subject:** Place item price on overdue notices

**Proposal:** Staff wants to see item price on notices for all overdue items. Currently, notices show replacement price if item is lost. Recommend that this feature (if implemented) be optional for libraries. Thanks.

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 3677 (02/27/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Set Ad Hoch reports by Fiscal Year for multiple FY in a Consortium

**Proposal:** We are a Consortium of 8 libraries and have four Fiscal years. It is important that each library gather year to date statistics by their own fiscal year as these are the statistics which are reported to the State Secretary's office.

In Dynix we had the ability to set the beginning date for statistics and to gather the statistics for a period of our choice. At present, it is necessary to generate the statistics each month and keep an external spreadsheet of the information.

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 3680 (03/01/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:** 7.3.1

**Subject:** Holds notices

**Proposal:** Apparently when setting up Holds Notices you can have the pickup location printed on the notices. You select that information and enter the text you want printed beside the location, such as Pickup at. This text information is not printed. Apparently you can enter this as a literal text field but then those words will also print on the overdue notices, which is not the appropriate phrasing. The current solution is to revise the hold block message. If the software provides for text to be printed out then it should do so.

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 3682 (03/01/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:** Horizon 7.3.158.9

**Subject:** Usage Counts

**Proposal:** I would like to be able to produce a report which shows me which items had the highest and lowest circulation based on annual usage. At present, I can only get the complete usage numbers and am not able to restrict it to the current year. I would like to be able to have usage counts per item, based on annual usage. I understand that in Dynix, staff were able to reset the usage counts on an annual basis.

**COMMENTS (Per Dynix):** [Planned for 8.x](#)

**Enhancement#:** 3692 (03/04/2004)

**Category:** Circulation

**Subcategory:**

**Software Version/Release:**

**Subject:** Portable In-House Checkin

**Proposal:** We would like to be able to do in-house checkin at the shelf where and when resheving occurs, rather than transport all those items to a circ terminal and then return them to the shelves.

A handheld like the psc top gun or the pt40 unit that would be downloaded later to a terminal somewhere.

**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 3716 (03/19/2004)

**Category:** Circulation

**Subcategory:**  
**Software Version/Release:** Horizon 7.3.1a  
**Subject:** Put borrower phone number on request pull list  
**Proposal:** We would like to be able to put the borrower's phone number on the request pull list. This way, if we are unable to find an item and need to contact the borrower, staff are saved the time of searching for the phone number in the borrower record.

**Enhancement#:** 3720 (03/24/2004)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:** Horizon 7.3  
**Subject:** REPORTS MANAGER  
**Proposal:** The user of Reports Manager (School module especially) should be able to customize an introductory paragraph so the person receiving the notice will know why they are receiving the notice and what will happen if they don't take care of their responsibilities. Also, the user of Reports Manager should be able to specify a range of dates (ex. the last week) to run notices instead of having to run all or nothing.  
**COMMENTS (Per Dynix):** [Web Reporter](#)

**Enhancement#:** 3723 (03/30/2004)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:** Horizon 7.24  
**Subject:** Title - make required field  
**Proposal:** Make the title field in a fast add record (table item\_fast\_add) a required field. Other fields such as call, itype, and ibarcode can be set to required currently, but not title.  
**COMMENTS (Per Dynix):** [Good idea](#)

**Enhancement#:** 3734 (04/12/2004)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:** Dynix ILS release 191  
**Subject:** Date when pre-overdue notices are sent  
**Proposal:** Several of our customers have requested the ability to select how many days before a due date they will receive pre-overdue notices. They feel that 7 days ahead for 21-day materials is too far in advance, where for most customers this allows time for them to schedule a library visit into their week. We would like this to be a patron empowerment feature: the ability for the customer to choose how many days in advance s/he will be sent a pre-overdue notice.  
**COMMENTS (Per Dynix):** [Good idea ; no new enhancements for Dynix](#)

**Enhancement#:** 3738 (04/13/2004)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:** 7.3  
**Subject:** Automatic email notice failover to print notice  
**Proposal:** Provide the ability for email notices that fail to be successfully delivered to be automatically rolled over to send a print notice the next day and for all future notices to be sent via printed notice until patron record is updated with a new email address.

**Enhancement#:** 3740 (04/13/2004)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:** 7.3  
**Subject:** Please improve request system documentation  
**Proposal:** Please improve the documentation on the Request Pull List and the Expired/Cancelled Holds list. The current documentation leaves room for confusion in a variety of places.

