

## Circulation—Borrower Records

**Enhancement#:** 2606 (11/29/2001)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:**  
**Subject:** Borrower Expiry Date  
**Proposal:** If you edit a borrower record and change their location this will cause their expiry date to change. Could this be prevented from happening? Log # 1205786  
**COMMENTS (Enhancement Cmte):** On a card which has already expired, if you make changes and save, our system will ask "Expiration Date in the...save anyway?" Need additional information.

**Enhancement#:** 3533 (12/10/2003)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:**  
**Subject:** Search This Location Only  
**Proposal:** Please make it so that we can remove the "Search This Location Only" option from the Borrowers menu. Staff members keep clicking on it, causing great commotions when they can't find a particular patron who was registered at another branch. The most frustrating part if that once someone has clicked on it, it stays clicked, even though someone else logs into Horizon and the system is set to not save any changes made by previous users. I can see where some libraries would like this feature, but please give us the option to turn it off.

**Enhancement#:** 3543 (12/17/2003)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3  
**Subject:** Search This Location Only Option  
**Proposal:** For school systems, the borrower option Search This Location Only needs to have the option of searching one location for student borrowers, but all locations for the btype assigned to teachers. Teachers are often assigned to more than one school, but multiple borrower records for these teachers might not be wanted. For ease of finding the borrower records, if they can borrow from all schools, they should appear on all borrower lists even if they have a location code for another school library. Without this option, either this feature is not useful for schools, or the school library staff have to remember to turn the feature off if they are looking for some staff members.

**Enhancement#:** 3546 (12/19/2003)  
**Category:** Circulation  
**Subcategory:** Borrower Records > Horizon  
**Software Version/Release:**  
**Subject:** Borrower Number on Borrower Checkout  
**Proposal:** We would like to add to the borrower checkout screen the borrower number from the borrower record. Currently you have the choice of displaying either the barcode or the borrower ID. We would like to add below that line the borrower number. Our reason for requesting this is because of our cash reporting requirements. When a borrower pays a fine we have to have them sign a cash sheet. On Ddynix we added their patron # which was displayed on the screen -- so you could find them if their name was not legible. We are asking for borrower # because that is a more constant # than either barcode or ID. We are asking for a customization quote for this but thought this might be something others would use also

**Enhancement#:** 3560 (01/09/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:**

**Subject:** Time Period for Change from Overdue to Lost  
**Proposal:** Currently the change of an overdue item from overdue to lost is tied to the intervals of overdue notices. We would like to be able to set a longer time period before something is made lost without having to change the interval between the other notices. For example: a first notice is sent 7 days after the item is due; a second notice is sent 7 days later; then a final notice is sent in 7 days; 7 days later the item is made lost. We would like to be able to have a longer time between the final notice and the system automatically changing something to lost. Other libraries might be interested in different time periods between first and final notices. It seems to be arbitrary to make this so ridged

**Enhancement#:** 3661 (02/23/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.1a  
**Subject:** Search Borrowers By Email Address  
**Proposal:** It would be nice if you could search the borrower record by email address as part of the default install. The reasoning behind this is so non-SQL skilled staff can look up patrons who would have recieved email notices, but the email bounced. This is fairly common in a large site. We get several every day.

**Enhancement#:** 3701 (03/10/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records > Horizon  
**Software Version/Release:**  
**Subject:** Renewal of Patron Registrations  
**Proposal:** When a Patron Registration expire, 3 choices come up: RENEW, CKO NO RENEW or CANCEL.  
 Suggestion #1: Add another choice called PAY FINES, so we can get into patron`s record so they can pay their fines before renewal.  
 Suggestion #2:: Be able to re-scan patron`s library card a second time on the same computer. Right now we can scan the card in only once per station per staff.

**Enhancement#:** 3772 (05/19/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.2.4  
**Subject:** Max Fine—Set by Borrower Type  
**Proposal:** Problem lies with maximum fine amount being able to be set only by item type and not by patron type as given in HSPLS Admin. Rules. This means that children and young adults maximum fine amount for an overdue book is \$7.50, because the default value is the \$7.50 maximum set for adult users. Parameter needs to be settable by the maximum number of days a fine can be assessed - i.e., 30 days, rather than a maximum \$ amount.

**Enhancement#:** 3801 (06/14/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.2  
**Subject:** Claims Return  
**Proposal:** Provide a way to change the status from Claims returned to Lost so that customers can pay for Claims returned items without first checking it in in damaged mode, then checking it back out to the customer and setting it to Lost then collecting the fee. When this is done, it is typically done at the service desk so streamlining is important.

**Enhancement#:** 3822 (07/02/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.2

**Subject:** Verification Block on Borrower`s Record That They Have Been Sent an Email or Printed Notice

**Proposal:** It would be nice for hold or overdue notification for email and printed notices if it would indicated a date the notices was completed as it does with phone notification blocks.

**Enhancement#:** 3876 (08/04/2004)

**Category:** Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** 7.24

**Subject:** Viewing the Copy/Issue of a Requested Serial

**Proposal:** When viewing a borrower request list it is not possible to view the issue of the magazine which is on request. It is also not possible to view the issue of the magazine requested when looking at the title request list in staff searching. Consequently borrowers do not know which issue of magazine they have requested. See also CR10878

**Enhancement#:** 3905 (08/23/2004)

**Category:** Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** 7.3.2

**Subject:** When Creating a New Borrower Horizon Checks to See if the Borrower Already Exists

**Proposal:** When we register new borrowers we need to first do a borrower lookup to see if the borrower is in the system, then exit out of the borrower search then create a new borrower. In Dynix 180 the software wouldn`t allow a duplicate. We would like to within the borrower record be able to search by name if a borrower is already registered.

**Enhancement#:** 3926 (09/03/2004)

**Category:** Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** 7.3.2

**Subject:** Ability to Adjust Order of Phone Number

**Proposal:** A lot of our borrowers have more than one phone number in the borrower record. The hold slip uses the first phone # in the borrower record. We usually list the home phone# first assuming it is the number he/she wants to be notified for hold. Very often borrower wants to change to another number such as work or cell or other phone for hold notification. We have to manually edit several numbers for the change. It would be very helpful if we could adjust the order of the phone number in Horizon without a lot of data entry going into it.

**Enhancement#:** 3936 (09/13/2004)

**Category:** Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** Horizon 7.3.2

**Subject:** Keeping Borrower Holds History

**Proposal:** In Dynix borrowers were able to keep a list of holds they placed during a calendar year. Our patrons greatly miss this functionality in Horizon & request it be applied to Horizon.

**Enhancement#:** 3937 (09/13/2004)

**Category:** Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** 7.3.2

**Subject:** Alert Staff or Borrower for Duplicate Request

**Proposal:** Provide an alert to staff or borrower in both Horizon & HIP when a request is placed for an item already on borrower request list.

**Enhancement#:** 3958 (09/22/2004)

**Category:** Circulation

**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.2  
**Subject:** Aging Lost Items to Missing  
**Proposal:** We would like to manually control the timing of when an item changes status from lost to missing (and claims return to missing.) Right now, because this process is in part tied to the notice schedule, the timing of when this aging process occurs is not consistent from itype to itype. For example - we have a policy that after an item has been out/lost for one year - we will delete that item and the customer no longer has the option to return the material. But materials like DVDs have shorter loan periods and shorter notice periods than books. We would like to be able to batch this lost to missing process based on a selection of materials meeting a criteria based on dates set by the library.

**Enhancement#:** 4010 (10/18/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.2  
**Subject:** Borrower Group Editor  
**Proposal:** Develop a group editor tool for borrower records much like Item Group Editor, using a compound search for borrower records and allowing editing of a group of borrower records from the returned list.

**Enhancement#:** 4016 (10/20/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.2  
**Subject:** Disposition of Processing Fees When the Borrower Returns the Lost Item Prior to Payment  
**Proposal:** Horizon should provide a parameter option that would control the disposition of Processing Fees when the borrower returns the lost item prior to payment. Currently in these situations the system clears the Lost Fee and retains the Processing Fee. We would like the system to clear the Processing Fee in the same manner that it clears the Lost Fee. The only exception would be when a borrower has already paid the Lost Fee and the Processing and then later locates the item and returns it to the library. In these instances the borrower should only be eligible for a refund of the Lost Fee but not the associated Processing Fee since the library presumably would have already incurred costs associated with the replacement process.

**Enhancement#:** 4059 (11/28/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.1A  
**Subject:** Name Fields  
**Proposal:** We would like to have more flexibility with the Borrower names. This could easily be achieved by allowing libraries to have multiple fields for borrower names. [Surname] [Forename] [Title (ie Mr, Mrs, Dr etc)]  
 These fields could then be manipulated for printing of notices or display purposes.

**Enhancement#:** 4089 (12/13/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.33  
**Subject:** Prompts for Recall  
**Proposal:** When recalling an item, the system should always prompt for the borrower for whom the item is being recalled. Currently, Horizon assigns the recall to whichever borrower is currently identified in the check out window. Only if there is no borrower identified in checkout does Horizon prompt for the borrower. However, each successive recall is assigned to the borrower that has been identified in checkout. This makes it easy to forget to identify a new borrower for each recall and thus to recall items for the wrong borrower. While the system should always prompt for the proper

borrower, it should easily provide the option to recall the item for the previously identified borrower (for instances when one borrower recalls multiple items).

**Enhancement#:** 4121 (12/21/2004)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.3  
**Subject:** Expired Library Registration window size adjustment  
**Proposal:** The Expired Library Registration window displays the borrower name and btype automatically but if the borrowers name is too long the window is not large enough to display the btype. It would be very helpful to see the btype for every borrower. We have several btypes where the borrower would owe a non resident fee on renewal and this would help our staff to be able to tell if that is the reason for the renewal. I have been told the size of this window is hard coded and cannot be adjusted without rewriting code.

**Enhancement#:** 4132 (01/06/2005)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** Dynix ILS 191  
**Subject:** SIF`s or LDAP  
**Proposal:** To allow the patrons to be tracked on Dynix with a SIF`s or LDAP server for authentication and accounts rather than importing everyday to keep track of the changes.

**Enhancement#:** 4155 (01/21/2005)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.3  
**Subject:** Access to Borrower Data Prior to Checkout  
**Proposal:** Right now, in order for a circulation desk operator to see certain data for a blocked or expired borrower, the operator must actually allow for CKO. We want it so that if a borrower is expired or blocked, the operator can access the borrower`s list of items out, look at the details of the block (and take remedial action as authorization permits), and see the expiration date details (and take remedial action as authorization permits) WITHOUT having to authorize CKO. In other words, any borrower ID entered into the system at CKO should FIRST deal with blocks or problems of any kind--with an overall override possible for authorized operators--before the system proceeds to allowing for checkout.

**Enhancement#:** 4156 (01/21/2005)  
**Category:** Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.3  
**Subject:** Borrower Records` Access, Creation, Updating  
**Proposal:** It should be possible to search, create, update, or delete borrowers record without having to open any circulation function. For example, we want a Borrower Search function that would allow a user to search for borrower records by the various access points (name, number, barcode, etc. simply by clicking a choice similar to ``Bib Quick Search``. Once located, the operator could enter/correct and save updated information. We also would want a Create New Borrower function that would utilize locally-defined templates for fast record creation--similar to the workforms used in the MARC Editor under ``Create New Bib.``

**Enhancement#:** 4188 (02/23/2005)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** Horizon 7.3  
**Subject:** Linking Borrower Records Together

**Proposal:** Parents are legally responsible for the juveniles materials checked out. We would like to be able to link the records of the parents and juveniles together so that if the juvenile can no longer check out the parent can no longer check out and vice versa. This would apply to all members of a family.

**Enhancement#:** 4199 (03/08/2005)

**Category:** Horizon > Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** 7.3.2

**Subject:** Counters in Borrower Record

**Proposal:** There are no counters in the borrower record other than number of checkouts.

The borrower record should include hold counters for:

active holds, no yearly restrictions

holds placed during current calendar year

holds cancelled

free holds (number to be determined by library)

charged holds (number to be determined by library)

holds not picked up

remote access, etc.

**Enhancement#:** 4205 (03/10/2005)

**Category:** Horizon > Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** 7.3.3

**Subject:** Email Address Doesn't Belong Where It Is

**Proposal:** Email address has nothing to do with mailing address. It needs its own blink where you can enter in multiple email addresses, and a spot to check which one notices get sent to. The problem resides mainly in the temporary address function, when I go to my summer home at the lake, my email address stays the same. The way the software works now, if i have may hotmail address in the permanent, and my `lake` email is blank, during the summer I get no email notices. This also has ramifications for HIP and the ability to have more than one email address (in case one goes bad). It would also be easier to pull in email address information into reports, most notably the notice\_review section of `circulation reports` where you would be able to tell which notices were going out via email and which were going out by regular mail.

**Enhancement#:** 4206 (03/10/2005)

**Category:** Horizon > Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** 7.3.3

**Subject:** Searching Borrowers

**Proposal:** Our staff would like to have this abilit in looking up patrons. It would be helpful if we could cancel out of a borrower account and go back to the list of patrons rather than back to the checkout screen. It saves time when you are looking at an entire family`s records.

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**Enhancement#:** 4328 (06/09/2005)

**Category:** Horizon > Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** Horizon 7.3.2

**Subject:** Send Borrower`s Contact/ID Info to a Printer Together with Selected Blocks

**Proposal:** We need to be able to send borrower information (name, e-mail, phone, address, barcode, DL#, stat class, etc.) to a local printer, or to an e-mail, together with selected blocks from the borrower records. This functionality would need to be available from the CKO screen.

Similar functionality would need to be available from the edit borrower screen, though without the need to send blocks to the printer.

**Enhancement#:** 4331 (06/13/2005)

**Category:** Horizon > Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** 7.24

**Subject:** Ability to Create a New Borrower Record by Copying and Editing an Existing Borrower Record

**Proposal:** We would like to be able to create a new borrower record by simply making a copy of an existing record and editing the copy. In the case of five new members from the same family, generally, all information is the same apart from the person's first name. Creating one record, copying it four times and editing the first name four times is quicker than typing up five records.

**Enhancement#:** 4370 (07/25/2005)

**Category:** Horizon > Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** Horizon 7.3.2

**Subject:** Add Author as a Display Possibility to the Borrower Request List

**Proposal:** We would like to have the ability to display the author of an item on a borrower's request list on that list

**Enhancement#:** 4391 (08/22/2005)

**Category:** Horizon > Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** 7.3

**Subject:** Warning Dialog Box When Duplicating Borrower Record

**Proposal:** The ``duplicate`` button on the bottom of the registration screen may be being clicked on by staff who are not working carefully and who mistake it for a ``save`` button. We would like to be able to have a warning box pop up when the ``duplicate`` button is pressed that will say something like ``Do you really want to copy this record? [Yes] [No]`` Ideally it would be easy to hook custom code to buttons in the interface so in general it would be possible add a custom event listener (that could pop up a warning message or fire another external process) to pretty much any button in the system.

**Enhancement#:** 4407 (09/12/2005)

**Category:** Horizon > Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** Horizon 7.3.2

**Subject:** Add a Compound Search to Borrower Search

**Proposal:** We would like to be able to conduct a compound search on borrowers so that name, borrower type could be combined to narrow results for self-registered or temporary borrowers when data is entered incorrectly. This would also be useful to locate borrowers with the same names - by combining phone or street or birthdate and name, etc.

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**Enhancement#:** 4433 (10/28/2005)

**Category:** Horizon > Circulation

**Subcategory:** Borrower Records

**Software Version/Release:** Horizon 7.4

**Subject:** Claims Returned Counter

**Proposal:** Add a counter for number of claims returned blocks placed to the borrower record. Increment counter when a cr block is placed. Decrement counter when a cr block is cleared at check in. Do not decrement counter when cr status is changed to missing.

This feature was available in NOTIS and it helped staff identify patrons who abused the claims returned process.

**Enhancement#:** 4470 (12/14/2005)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.3.2  
**Subject:** Checkout to Expiring Borrower  
**Proposal:** When a borrower record is due to expire, can the pop-up block requesting truncation of the due date be applied to the entire checkout rather than requiring a response item by item?

**Enhancement#:** 4494 (01/17/2006)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.4  
**Subject:** Viewing Routing Titles  
**Proposal:** Can the borrower record contain the ability to view the Titles that the borrower may be on a routing list for?

**Enhancement#:** 4529 (02/22/2006)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.33  
**Subject:** Need Warning Message When No Barcode Avail  
**Proposal:** When a library patron`s card is lost and it is set to lost in the system, then the borrower has no barcode. The system will still allow them to check out books, we propose that it should give a warning that ``borrower has no barcode``. Our library has a policy that patrons are not allowed to check out books without a barcode, however, since the software still allows it, it is hard to control especially since there is no warning that the patron has no barcode.

**Enhancement#:** 4580 (05/16/2006)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.33  
**Subject:** Borrower Barcodes Should Show Active Barcode First  
**Proposal:** The borrower barcode on the patron record should display the active barcode first. As it is right now, sometimes a patron`s lost barcode will show first and this confuses our staff who neglect to look at the lost date. In general, it should be possible to specify an order for a blink.

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**Enhancement#:** 4607 (08/15/2006)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** Horizon 7.3.2  
**Subject:** Payment Balance Shown In Horizon  
**Proposal:** Can there be a better way to breakdown payments for a customer? It would be great if the payment history showed a remaining balance on the date of the payment. For example, a patron owes \$40. He pays \$25 on 8/11/06. The payment history will list the date paid, the amount paid for each item, and (the new) feature, the remaining balance of \$15. Many customers will say but I paid about twenty \$ on such and such date forgetting that their amount due was higher than their payment. This gets confusing when additional fines are added after the payment date. Without a running tab it can be difficult for front line staff to decipher. The payment receipt does list the account balance after payment. Perhaps that could be added to the payment history screen.

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**Enhancement#:** 4630 (10/18/2006)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** Horizon 7.3.4  
**Subject:** Btype and expiration date  
**Proposal:** We would like the automatic extension of a borrower's expiration date if the btype is changed to be at the library's discretion, ie. perhaps a check box for automatic, blank for no change of expiration date. This is similar to 2606. This really became a nuisance for us as we set all patrons to expire at varying periods depending on their btype recently.

**Enhancement#:** 4635 (11/06/2006)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** Horizon 7.34  
**Subject:** Email Address required for email notice  
**Proposal:** Horizon should not allow a borrower record to be saved if it's been set to receive notices by email and there is no email address entered. If a customer uses HIP to delete their email address and they're set to receive email, Horizon should reset them to Standard notice.

**Enhancement#:** 4646 (12/11/2006)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.4  
**Subject:** Circulation History Details Disappear  
**Proposal:** When an item is deleted, the title disappears from the circulation history. This just leaves a number and a date. Over time records will just have numbers and dates! Can the title be stored also?

**Enhancement#:** 4657 (01/15/2007)  
**Category:** Horizon > Circulation  
**Subcategory:** Borrower Records  
**Software Version/Release:** 7.4  
**Subject:** Homebound Borrower Log  
**Proposal:** Can the author be included in the Homebound borrower log? Issuing the same title by different authors falsely gives the response that the item has already been loaned, as the homebound borrower log is simply looking at the title details.