Horizon
Reserve Bookroom
User’s and Administrator’s Guide
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Welcome

Welcome to Horizon Reserve Bookroom. Reserve Bookroom lets you reserve items for a specific instructor or the instructor’s students. These students can then use or check out the items for a limited amount of time during a school semester. This is helpful if an instructor needs to make a single item available to many students over the course of a school semester.

You can place both library-owned and non-library owned items on reserve. (For example, an instructor may want to make a personal copy of a play available to students.) You can place library-owned items on reserve by temporarily moving the item to the reserve location. You can place non-library owned items on reserve by creating a temporary Item record for use while you store the item in the reserve location.

About This Guide

The Reserve Bookroom User’s Guide is for all users and system administrators. It contains step-by-step instructions that explain how to install Reserve Bookroom and set up the necessary parameters and privileges in Horizon. It also explains how to use Reserve Bookroom to place items on reserve and track the items in the reserve location.

This section explains these topics:

- Chapters
- Online Guides and Web Updates
- Feedback
- Disclaimer
- Conventions

Chapters

This guide contains these chapters and major sections:

- Chapter 1, “Getting Started,” explains the basic information you need to begin using Reserve Bookroom, and gives you an overview of this guide.
- Chapter 2, “Setting Up Your Horizon Database,” explains how to set up Reserve Bookroom parameters and security on your Horizon system.
- Chapter 3, “Setting Up Course and Instructor Records,” explains how to create records for instructors and courses. It also explains how to add and remove courses and instructors from Instructor Course Title (ICT) records.
- Chapter 4, “Reserving Library-Owned Items,” explains how to place on reserve items that your library owns, or items in your main library catalog. It also explains the information you can change about an item after you place it on reserve.
- Chapter 5, “Reserving Other Items,” explains how to place on reserve items that your library does not own (for example, an instructor’s personal copy). It also explains the information you can change about an item after you place it on reserve.
Chapter 6, “Withdrawing Items from Reserve,” explains how to withdraw items from reserve. It also explains how to set up withdrawal instructions and instructor letters. Finally it explains how to delete records from Reserve Bookroom.

• Index to the guide.

Online Guides and Web Updates

In addition to the printed copy, this guide is available online as a PDF (Portable Document Format) file. You can install the PDF files from the Horizon installation CD. To view any PDF file, you must install Adobe’s Acrobat Reader on your workstation. (This software is provided by Adobe free of charge.) You can download the latest version of Acrobat Reader from Adobe’s web site at “www.adobe.com”. Once you have installed the PDF files and Acrobat Reader, you can access the files by choosing Launch Help Center from the Help menu in Horizon, or by pressing F1. You can also view a copy of the Horizon Basics Guide in the Help Center.

You can also access the most current PDF version of this guide at Dynix’s customer web site at “customer.dynix.com”. Accessing the Horizon Documentation site on the Web requires a login and password. If you do not already have a login and password, contact your system administrator.

Feedback

The Documentation Team at Dynix wants to provide you with the most complete and useful documentation possible. If you have any comments about this guide, please let us know. We appreciate your feedback and we will use it to improve future versions of the guide. You can send your comments via e-mail to “hdocs@dynix.com”. If you need immediate assistance, contact your system administrator.

Disclaimer

The process names and sample windows in this guide reflect the default settings that are delivered with most new Horizon installations. The settings on your system may be different from these defaults, depending on your library’s implementation choices and the way your system administrator sets up your Horizon system. (For example, your system administrator can add fields to windows, reorganize the processes that display on the navigation bar, and set up security to limit access to certain processes.)

Additionally, as you use Horizon, you can resize windows or customize your Launcher workspace. Consequently, your Horizon environment may look and function differently than the environment described in the tasks in this guide. (For information about customizing and restoring window size or the Launcher workspace, see the Launcher Configuration Guide.)
Conventions

About This Guide

Conventions

This section explains the documentation conventions used in this guide.

Mouse Conventions

- **Click.** To place the mouse pointer on an icon, command, or button and quickly press and release the primary (usually the left) button once.
- **Double-click.** To place the mouse pointer on an icon, command, or button and quickly press and release the primary mouse button twice.
- **Right-click.** To place the mouse pointer on an icon, command, or button and quickly press and release the secondary (usually the right) button.
- **Drag.** To press and hold the primary mouse button while moving the mouse.
- **Choose.** To select an option from a menu, group of options, or list.
- **Highlight.** To click once on an option in a list so the option is selected and displays in reverse video. In a field, you may drag the mouse over text to highlight that text.

Keyboard Conventions

- Keys on the keyboard are shown in uppercase, bold characters (for example, “the TAB key”). The keys on your keyboard may not be labeled exactly as they are in this guide.
- When you are instructed to press two or more keys at the same time, the keys are connected by a plus sign. (For example, ALT+H means to hold down the ALT key and press the H key.)
- Text or numbers that you are instructed to enter using the keyboard are enclosed in quotation marks (for example, enter “main” in the Location field).

General Conventions

- In step-by-step instructions, the names of menus, buttons, fields, and other options appear in bold typeface (for example, “the OK button” or “the Borrower field”).
- When you are instructed to choose an option from a menu, the menu and menu options are separated by commas. (For example, “choose File, Save” means to choose the File menu, then choose the Save option from the menu.)
- Text in italics shows general information that you must replace with information that is specific to your system. (For example, you would replace password with a specific password, such as 123gr@ndma.)
This guide assumes that you have a basic knowledge of your Windows operating system, Horizon, and working in Horizon windows. At the minimum, you should know how to:

- Use a mouse or keyboard to do basic tasks, such as choosing menu options and buttons.
- Work with windows (selecting, moving, minimizing, restoring, maximizing, sizing, scrolling, closing, and so on).
- Work with dialog boxes.
- Log in to Horizon, change operators, and log off Horizon.
- Search for records on the Horizon system.
- Work in Horizon list and edit windows.

Additionally, you need to understand how to use the Launcher environment. The Launcher is the framework that you use to open and navigate through the various Horizon processes. You can also use it as a tool to access some of your other desktop functions.

The Launcher workspace starts automatically when you first log in to Horizon. It includes pop-up lists, toolbars, and a navigation bar that help you do tasks easily. You or your system administrator can customize toolbars, the navigation bar, and some other features of the Launcher environment.
Here is an example of a Launcher workspace:

**Figure 1.1: Launcher Workspace**

If your navigation bar is set up to show shortcuts, they display in this column.

You can choose options from the menu bar to start processes or do tasks. The available menu options vary, depending on where you are in Horizon.

The active window's title bar displays in a different color from other open windows.

If you use the Workbook view, each open window or process has a tab. You can click a tab to activate the window or start the process.

You can activate a pop-up list by right-clicking the mouse in the Launcher workspace, or in an open window or record. Pop-up lists give you options that vary depending on where you are in Horizon.

Horizon displays process, record, and other windows in the main Launcher workspace.

For more information on working in the Launcher environment, see the *Horizon Basics Guide*.

This section explains these topics:

- Starting a Horizon Process
- Customizing the Launcher
Chapter 1: Getting Started

Starting a Horizon Process

When you do a task in Horizon, you must first start the process that lets you do the task. If you have already started several processes, you can activate the open process window that you want to use. The active window’s title bar displays in a different color from other open windows. If the windows are displayed in a cascade, the active window moves to the front.

**NOTE**

If you cannot activate a different window, the currently active window needs attention before you can continue. You must either close the window, or cancel or finish its process. (For example, if the window is a search window, you must complete the search, cancel the search, or close the window before you can start a different process.)

Horizon lets you use several different methods to start most processes. The various tasks in this guide usually give only one or two of the methods. As you work with Horizon, you will discover which methods are most convenient for you.

For example, if you work best using a mouse, you may choose to use the menu bar to start processes. If you prefer using a keyboard, you may choose to use keyboard shortcuts.

**NOTE**

Your security settings and Launcher configuration may affect the options that you can use to start some processes. (For more information, see your system administrator.)

This section explains some of the methods you can use to start a process in Horizon. (For examples of some of these methods, see Figure 1.1, “Launcher Workspace,” on page 1-7.)

This section explains these topics:

- Starting a Horizon Process Using a Mouse
- Starting a Horizon Process Using a Keyboard
Starting a Horizon Process Using a Mouse

When you use the mouse to start a process, you click or double-click on a specific part of the Launcher workspace. Here are some of the ways you can use a mouse to start a process:

- **Double-click on a process or tool on the navigation bar.** The navigation bar stores processes and tools in folders. (For more information, see “Horizon User Interface” chapter of the *Horizon Basics Guide*.)
- **Click on a toolbar button.** You can use the toolbar to start a process only if you (or your system administrator) have added a button for that process. (For more information, see the “Customizing the Toolbar” chapter of the *Launcher Configuration Guide*.)
- **Click on an option from the menu bar.** Choose Window and the open window or record that you want to make active.
- **Click on the window that you want.** If you can see part of the window or record that you want to make active, click on the window.
- **Use the Workbook view.** Click on the tab of the open window or record that you want to make active. (For instructions on opening the Workbook, see the “Horizon User Interface” chapter of the *Horizon Basics Guide*.)

Starting a Horizon Process Using a Keyboard

When you use the keyboard to start a process, you press a certain sequence of keys. You must know the keystrokes that open the function that you want. If your navigation bar is open and is set up to display shortcuts, you can see the keystrokes listed there. (However, the navigation bar does not have to be open for you to use the shortcuts.) The drop-down menus on the menu bar also display several keyboard shortcuts.

Your security settings may give you the rights to edit or create a shortcut. (For more information, see the *Launcher Configuration Guide*.)

You can use the keyboard in these ways:

- **Lead-in keys.** A lead-in key focuses the cursor on a certain set of tasks from which you can choose. The F9 key focuses the cursor on the navigation bar, so that your next keystroke moves you through the folders of the navigation bar to find the process that you want to start. (You can use arrow keys, the first letter of the process that you want, or choose Find from the Edit menu to move to the process.)
- **Predefined keyboard shortcuts.** Windows and Horizon have certain default shortcuts that can help you in your work. You cannot change these shortcuts. (For example, F2 starts a New Search.) (For a list of the most common predefined keyboard shortcuts, see “Shortcut Keys” in the “Horizon User Interface” chapter of the *Horizon Basics Guide*.)
- **User-defined keyboard shortcuts.** You can create shortcuts that start Horizon processes when you customize the Launcher. (For more information, see the *Launcher Configuration Guide*.)

• **Press ALT+W.** This activates the Window drop-down menu. Then type the number of the open window or record that you want to make active.

```
**NOTE**

Pressing **ALT** plus any underlined letter in the menu bar activates the drop-down menu for that menu option.
```

• **Press CTRL+F6.** This cycles through the open windows.

---

## Customizing the Launcher

Depending on your security settings, you can customize your Launcher. (For instructions, see the *Launcher Configuration Guide.*) In general, you or your system administrator can customize the Launcher in these ways:

- **Toolbars.** You can create a new toolbar or modify an existing toolbar’s appearance and design so that the toolbar shows only the processes you use frequently.

- **Navigation bar.** You can hide or add new folders, processes, and applications to the navigation bar, including third party products. You can also set up shortcuts for processes and applications on the navigation bar.

- **Diacritics.** You can add, delete, and edit the non-keyboard characters (such as the British pound or an accent mark) that are available on the Diacritic Shortcut Bar. You can also specify the shortcuts for each character.

- **Background.** You can choose what background displays in the Launcher workspace.

- **Startup.** You can choose the processes that start automatically, and which folders on the navigation bar open automatically, when you first log in to Horizon.

```
**NOTE**

Unless your security settings let you save changes that you make in the Launcher environment, the Launcher may revert to its default appearance when you log off.
```
Reserve Bookroom Basics

Reserve Bookroom lets you reserve items in a special location over a period of time. You can place on reserve library-owned items (items owned by your library) or other items (items not owned by your library). While an item is in reserve, you can determine the loan period and other circulation privileges for the item. (For example, you can set a loan period of two hours for reserve items.) You can reserve items for instructors and courses.

This section explains these topics:

- Reserve Bookroom Processes
- Basic Reserve Bookroom Tasks

Reserve Bookroom Processes

When you first install Horizon, the Reserve Bookroom folder on the navigation bar contains these folders and processes:

Figure 1.2: Reserve Bookroom Processes

You may see only some of these Reserve Bookroom processes on your navigation bar. Your security setup and Launcher configuration determine what processes are available on your navigation bar, and where they display. (For more information, see your system administrator or the Launcher Configuration Guide.)
Chapter 1: Getting Started

Basic Reserve Bookroom Tasks

Reserve Bookroom includes reports and other Horizon features that let you place items on reserve, circulate reserve items, and withdraw items from reserve. In order to use Reserve Bookroom, you must set up a separate reserve location. You can do reserve tasks from the reserve location. When you log into Horizon, you can choose a default reserve location. After you log into Horizon you can switch to any reserve location you have set up.

In Reserve Bookroom you can create Instructor, Course, Title, and Item records. As you create these records, you can set session defaults that let you enter the same reserve information into several different records. After you create instructor and course records, you will routinely search for them as you do other Reserve Bookroom tasks, such as placing an item on reserve.

This section explains these topics:

- Switching to a Reserve Location
- Setting Reserve Session Defaults
- Searching for a Course
- Searching for an Instructor

Switching to a Reserve Location

In order to do reserve tasks, such as searching for a reserve instructor or course, you need to log in to the reserve location. The reserve location is a separate Horizon location in addition to your main library or other branches. (For instructions on setting up a reserve location, see “Setting Up a Reserve Location Record” on page 2-3.) If you set up a default reserve location, you can automatically do reserve tasks for that location after you log in to Horizon.

If you do not want to log in to the reserve location (for example, you may want to continue doing cataloging tasks in the main location), you can simply switch to a reserve location. This lets you do reserve tasks in the reserve location and non-reserve tasks in the location you are logged in to. This is also helpful if you have more than one reserve location. You can switch to a different reserve location without logging out of Horizon.

NOTE

You may want to set the reserve location as the default location for Reserve Bookroom workstations. When users log in to Horizon on these workstations, Horizon automatically logs in to the reserve location. (For instructions, see the “Logging In to and Out of Horizon” in the “Getting Started” chapter of the Horizon Basics Guide.)
To switch to a reserve location

1. Start the **Switch RBR Location** process.
   
The default location of this process is the **Reserve Bookroom** folder on the navigation bar.

   Horizon displays the Code Lookup Location Parameters window:

   ![Code Lookup Location Parameters]

2. Choose the reserve location that you want to switch to.

3. Click **OK**.

   If you have any Reserve Bookroom windows open, Horizon displays this message:

   ![Switch RBR Location]

4. If Horizon displays the Switch RBR Location window, click **OK**.

   Horizon closes all open windows and switches to the reserve location.

### Setting Reserve Session Defaults

A reserve session is the period of time you are logged in to the reserve location to create reserve records or place items on reserve. If you need to create a large group of reserve records with similar information, you can set session defaults instead of entering the same information for each record. (For example, you can set the location default to be the same for all Item records that you create during a session.)

You can start a new session by setting different defaults at any time while you are doing reserve tasks. (For example, if you need to place a large number of videos on reserve, you can change the default ITYPE for this session to “video”.) You can save your settings for future sessions, or you can restore the original default settings.
If you set session defaults, Horizon automatically supplies the default information in reserve records when you work with Instructor and Course records. (For more information, see “About Setting Up Course and Instructor Records” on page 3-3.) Horizon also supplies the default information when you create reserve Title records and place items on reserve. (For more information, see “About Reserving Library-Owned Items” on page 4-3 and “About Reserving Other Items” on page 5-3.) If necessary, you can change the default information as you work with individual reserve records.

To set reserve session defaults

1. If you have not already done so, switch to the reserve location.
   (For instructions, see “Switching to a Reserve Location” on page 1-12.)
2. Start the Set Defaults process.
   The default location of this process is the Reserve Bookroom folder on the navigation bar.
   Horizon opens the Session Defaults window:

   ![Session Defaults window](image)

   Click OK to use these settings for the current session only.
   Click Restore Settings if you want to use the permanent session default settings.
   Click Save Settings if you want to make these settings permanent.

   **NOTE**
   Session defaults are not required. You can set some session defaults and leave other fields blank.
3  To set general defaults, complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td># Required</td>
<td>Enter the number of items that you need to place on reserve for each title during this session. (For example, enter “2” if you typically place two copies of the same title on reserve.)</td>
</tr>
<tr>
<td>Date on Res.</td>
<td>Enter the date that the items need to go on reserve.</td>
</tr>
<tr>
<td>Date to Withdraw</td>
<td>Enter the date that the items need to be withdrawn from reserve. (After this date, Day End automatically changes the status of the item to “inactive.” For more information about this status, see “Inactivating a Reserve Title” on page 6-9.)</td>
</tr>
<tr>
<td>Date to Reactivate</td>
<td>Enter the date that the items need to go back on reserve. (After this date, Day End automatically changes the status of the item to “active.” For more information about this status, see “Using a Pick List Report” on page 4-15 or “Editing Reserve Information for a Title” on page 5-12.)</td>
</tr>
</tbody>
</table>

4  To set course and instructor defaults, complete or update these groups:

<table>
<thead>
<tr>
<th>In this group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Instructor to Course Default</td>
<td>Do one of these options: • If you want the option to add some or all of the titles linked to an instructor when you add an instructor to a course, mark <strong>add all or selected title</strong>. • If you do <strong>not</strong> want to add any titles linked to an instructor when you add an instructor to course, mark <strong>add new titles</strong>. (For more information, see “Adding an Instructor to a Course” on page 3-10.)</td>
</tr>
</tbody>
</table>
Chapter 1: Getting Started

To set item defaults, complete or update these fields and options:

<table>
<thead>
<tr>
<th>In this group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Course to Instructor Default</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want the option to add some or all of the titles linked to a course when you add a course to an instructor, mark <strong>add all or selected title</strong>.</td>
</tr>
<tr>
<td></td>
<td>• If you do <strong>not</strong> want to add any titles linked to a course when you add a course to an instructor, mark <strong>add new titles</strong>.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Adding a Course to an Instructor” on page 3-8.)</td>
</tr>
</tbody>
</table>

5. To set item defaults, complete or update these fields and options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter the reserve location that you want these items to belong to, or click <strong>Codes</strong> to choose from a list. (This is helpful if you have more than one reserve location.)</td>
</tr>
<tr>
<td>Item Type</td>
<td>Enter the item type (ITYPE) that you want items to be when you place them on reserve, or click <strong>Codes</strong> to choose from a list. (ITYPE determines the loan period for an item.)</td>
</tr>
<tr>
<td>Collection</td>
<td>Enter the collection that you want these items to belong to in the reserve location, or click <strong>Codes</strong> to choose from a list.</td>
</tr>
<tr>
<td>Withdr. Instr.</td>
<td>Click <strong>Codes</strong> and choose the withdrawal instruction that you want to use for these items, or to create new instructions. (For more information, see “Setting Up Withdrawal Instructions” on page 6-4.)</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Withdraw Catalog Action</td>
<td>Choose one of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>None.</strong> If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Discard Item.</strong> If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Discard Item and Bib.</strong> If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Archive Item.</strong> If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Archive Item and Bib.</strong> If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option. (If more than one item is linked to the title, you cannot archive the Title record.)</td>
</tr>
</tbody>
</table>

**WARNING:** If you are working with library-owned items, do **not** mark the “Discard Item” or “Discard Item and Bib” options; otherwise, when you withdraw library-owned items, Horizon deletes the Item or Title records from your system. (For more information, see “Choosing a Withdrawal Cataloging Action” on page 6-10.)

6 Do one of these options:

<table>
<thead>
<tr>
<th>Save these default settings for this session only</th>
<th>Make these default settings permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click <strong>OK.</strong></td>
<td>Click <strong>Save Settings.</strong></td>
</tr>
<tr>
<td>The original settings return when you start Horizon again.</td>
<td>These settings remain in Horizon until you click Save Settings again.</td>
</tr>
</tbody>
</table>
Chapter 1: Getting Started

Searching for a Course

After you create a Course record, you can search for the record in Reserve Bookroom. You search for Course records when you add an instructor to a course, create reserve titles, and place items on reserve.

To search for a course

1. Start the Search Course process.
   
   The default location of this process is the Reserve Bookroom/Course folder on the navigation bar.
   
   Horizon opens this Search window:

   ![Search Window](image)

2. Choose a search index.
   
   (For example, you can search an index of course numbers.)

3. Do one of these options:
   
   - Enter the name, or other identifying information, of the course in the Search for field.
   - Enter an asterisk (*) in the Search for field to see a list of all courses.

4. Click OK.

5. If Horizon displays a list of courses, choose the one you want.

6. Continue with your task.
Searching for an Instructor

After you create an Instructor record, you can search for the record in Reserve Bookroom. You search for Instructor records when you add a course to an instructor, create reserve titles, and place items on reserve.

To search for an instructor

1. Start the Search Instructor process.
   
   The default location of this process is the Reserve Bookroom/Instructor folder on the navigation bar.
   
   Horizon opens this Search window:

   ![Search Instructor Window]

   2. Choose a search index.
      
      (For example, you can search an index of instructor names.)
   
   3. Do one of these options:
      
      - Enter the name, or other identifying information, of the instructor in the Search for field.
      - Enter an asterisk (*) in the Search for field to see a list of all instructors.
   
   4. Click OK.
   
   5. If Horizon displays a list of instructors, choose the one you want.
   
   6. Continue with your task.
Setting Up Your Horizon Database

This chapter explains how to set parameters in Horizon that affect Reserve Bookroom, such as the reserve location for each PAC flavor.

- About Setting Up Your Horizon Database 2-3
- Setting Up a Reserve Location Record 2-3
- Defining Reserve Circulation Privileges 2-5
- Assigning Reserve Locations to a PAC Flavor 2-7
- Determining Reserve Item Statuses 2-9
- Setting Up Reserve Bookroom Security 2-11
About Setting Up Your Horizon Database

Before you can reserve items by instructor or course, and before you can let users check out reserve items, you need to set up Reserve Bookroom parameters to govern these functions. Some setup tasks affect Horizon generally and others are specific to Reserve Bookroom.

This chapter explains these topics:

- Setting Up a Reserve Location Record
- Defining Reserve Circulation Privileges
- Assigning Reserve Locations to a PAC Flavor
- Determining Reserve Item Statuses
- Setting Up Reserve Bookroom Security

Setting Up a Reserve Location Record

When you place items on reserve, the item’s location temporarily changes to the Reserve Location. Having a separate Location record for reserve instructors, courses, and items lets you keep instructor, course, and item circulation privileges separate from the library’s main location. (For example, you can set up reserve loan periods and fine rates that are different for items housed at their regular location, such as the main stacks.)

Most of the fields on the Location record are explained in the *System Administration Guide*. (For more information and instructions on completing these fields, see “Setting Up Parameters for a Reserve Location” in the “General Setup” chapter in the *System Administration Guide*.)

These are the fields on the Location record that you can set up for Reserve Bookroom:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Code</td>
<td>Enter the code for the reserve location. This code can be up to seven characters. (For example, enter “mainres”.)</td>
</tr>
<tr>
<td>Name</td>
<td>Enter the name of the reserve location. (For example, enter “Main Location Reserve”.)</td>
</tr>
<tr>
<td>Instructor Letter</td>
<td>Enter the text you want to use to notify instructors when their items will be removed from the reserve location and give them any other instructions. (For example, you can explain how to keep an item in reserve, or who to contact.) (For more information, see “Printing Instructor Letters” on page 6-7.)</td>
</tr>
</tbody>
</table>
### In this field | Do this
--- | ---
CKI Note on RB | Enter the text you want to display in Circulation when an item flagged for reserve is checked.
(For example, enter “Send item to the reserve location.”) (For more information, see “Flagging Items for Reserve” on page 4-12.)

CKI Note on RW | Enter the text you want to display in Circulation when an item flagged for withdrawal from reserve is checked in.
(For example, enter “Return to Reserve for withdrawal”.) (For more information, see “Flagging Items for Withdrawal” on page 6-16.)

Inst. Mailing Label | Enter the type of label you want to use for sending withdrawal notices to instructors, or click Codes to choose from a list.

Default Reserve Location | Enter the code for the reserve location you are setting up, or click Codes to choose from a list.
(You should also set up the default reserve location for your main location. [For example, if you have two reserve locations, “Main Reserve” and “Medical Reserve”, you can make “Medical Reserve” the default reserve location.] When you log in to the main location, you can begin doing reserve tasks in the reserve location without first switching to the reserve location.) (For more information, see “Switching to a Reserve Location” on page 1-12. For instructions on setting up your main locations, see “Setting Up a Location Record” in the “General Setup” chapter of the System Administration Guide.)
Defining Reserve Circulation Privileges

You can set up circulation privileges for reserve items that are different from the privileges for normal items. Circulation privileges include loan periods, fine rates, notices, renewal guidelines, and so forth. You can set up unique circulation privileges for each reserve location using the circ_privilege_code view in the Table Editor. (For more information about circulation privileges and instructions on defining them, see the Circulation Setup Guide.)

You must define these circulation privileges for each reserve location:

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan Period</td>
<td>Determines how long most borrowers can check out most items.</td>
</tr>
<tr>
<td>Renewal Period</td>
<td>Determines the length of time for which borrowers may renew items.</td>
</tr>
<tr>
<td>Maximum Number of Renewals</td>
<td>Determines how many renewals, including phone renewals, most borrowers can make for a single item.</td>
</tr>
<tr>
<td>Maximum Number of Phone Renewals</td>
<td>Determines how many renewals most borrowers can make by telephone for a single item.</td>
</tr>
<tr>
<td>Hold Period</td>
<td>Determines how many days most items remain with a “hold” status before Day End cancels the hold.</td>
</tr>
<tr>
<td>Grace Period</td>
<td>Determines how long most items can be overdue before the borrower is fined.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> The grace period includes days the library is closed.</td>
</tr>
<tr>
<td>Fine Rate</td>
<td>Determines the amount most borrowers must pay for most overdue items per day or hour. (You can specify the loan type, day or hour, in each ITYPE record.)</td>
</tr>
<tr>
<td>First Notice Delay</td>
<td>Determines how many days after an item becomes due before Horizon generates the first overdue notice for that borrower type.</td>
</tr>
<tr>
<td>Notice Interval</td>
<td>Determines the number of days between subsequent notices.</td>
</tr>
<tr>
<td>Maximum Number of Notices</td>
<td>Determines how many overdue notices are sent to most borrowers.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> The maximum number of overdue notices you specify here should not exceed the number of overdue notices defined in block types. (For example, if you have defined three overdue notices in block types, you should set Maximum Number of Notices no higher than “3”.)</td>
</tr>
</tbody>
</table>
## Chapter 2: Setting Up Your Horizon Database

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Number of Items Out</td>
<td>Determines how many items most borrowers can have checked out at any given time.</td>
</tr>
<tr>
<td>Suspend Days</td>
<td>This value, multiplied by the number of days an item is overdue, determines the number of days Horizon suspends a borrower’s circulation privileges. (For example, if borrower suspension is set at “5”, borrowing privileges will be suspended for five days for every day an item is over due.)</td>
</tr>
<tr>
<td>Guaranteed Loan Period</td>
<td>Determines the number of days, hours, or minutes borrowers are guaranteed to have an item. (Recalls placed on the item generate a due date beyond the guaranteed loan period.)</td>
</tr>
<tr>
<td>Recall Loan Period</td>
<td>Determines the number of days, hours, or minutes a borrower has in order to return a recalled item.</td>
</tr>
<tr>
<td>Recall Fine Rate</td>
<td>Determines how much most borrowers must pay per day or hour for overdue recalled items. (You specify the loan type, day or hour, in each ITYPE record.)</td>
</tr>
<tr>
<td>First Recall Notice Delay</td>
<td>Determines how long after a recalled item becomes overdue before Horizon generates a first recall notice for most borrowers.</td>
</tr>
<tr>
<td>Recall Notice Interval</td>
<td>Determines the number of days between subsequent recall notices.</td>
</tr>
<tr>
<td>Maximum Number of Recall Notices</td>
<td>Determines the maximum number of recall notices sent to a borrower. This works with the block table.</td>
</tr>
<tr>
<td>Allow OPAC Renewals</td>
<td>Lets borrowers renew items for themselves using Horizon Information Portal.</td>
</tr>
<tr>
<td>Max OPAC Renewals</td>
<td>Determines the maximum number of renewals a borrower can make for himself or herself using Information Portal.</td>
</tr>
<tr>
<td>Allow Ovrd. OPAC Renewals</td>
<td>Lets borrowers renew items that are currently overdue for themselves using Information Portal.</td>
</tr>
</tbody>
</table>
Assigning Reserve Locations to a PAC Flavor

Reserve items can belong to only one reserve location. Users must search the correct reserve location to find items that belong to that location. When staff members, instructors, and students search for reserve items, they can choose the reserve location they want to search.

The PAC flavor for the user determines which reserve locations the user can search. (For example, you may give staff members a choice between the main reserve library and the reserve library on another campus, while you let students search only the main reserve library.) You can specify the reserve locations available for each PAC flavor.

To assign reserve locations to a PAC flavor

1. Start the PAC Flavor Table process.
   The default location of this process is the Searching\PAC Control Menu folder on the navigation bar.
   Horizon opens the List Public Access Flavor window.

2. Do one of these options:
   - Click New to create a new flavor.
     (For instructions on creating a new flavor, see the “PAC Flavors” section of the “Searching Setup” chapter in the System Administration Guide.)
   - Choose the PAC flavor you want to edit, then click Edit.
   Horizon opens the Edit Public Access Flavor window.

3. Click Page Down, or resize the window to display the Reserve Location group:
   You can add or delete reserve locations for the PAC flavor.
Chapter 2: Setting Up Your Horizon Database

4 Do one of these options:

<table>
<thead>
<tr>
<th>Add a reserve location to this PAC flavor</th>
<th>Remove a reserve location from this PAC flavor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Click <strong>New</strong>.</td>
<td>1 Choose the location from the drop-down list.</td>
</tr>
<tr>
<td>2 Enter the reserve location you want to assign to this PAC flavor in the <strong>Location</strong> field, or click <strong>Codes</strong> to choose from a list.</td>
<td>2 Click <strong>Delete</strong>.</td>
</tr>
<tr>
<td>3 Enter a number in the <strong>Order</strong> field.</td>
<td></td>
</tr>
<tr>
<td>Horizon displays a list of reserve locations in order when users choose a reserve location to search.</td>
<td></td>
</tr>
<tr>
<td>4 Repeat steps 1 through 3 in this table for each reserve location you want add.</td>
<td></td>
</tr>
</tbody>
</table>

5 Save your changes.
You must restart Horizon for your changes to take effect.
Determining Reserve Item Statuses

An item’s status, in conjunction with the item’s location, indicates where an item is in the reserve process. You determine which items can be placed on reserve according to the item’s status. Staff members can reserve only those items with statuses that you determine. (For example, you may let staff members place an item on reserve that is checked in to the main location, while you prevent them from placing items on reserve that are currently missing from the main library.)

You can choose to let staff members reserve items with any item status; however, there are only a few statuses that logically apply to reserve items. This table lists some item statuses that may apply to reserve items:

<table>
<thead>
<tr>
<th>Status</th>
<th>Location</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserve Bookroom (rb)</td>
<td>Owning (main)</td>
<td>An item with this status is flagged for reserve but is not yet available to circulate in the Reserve Bookroom. The item is library-owned and still in the main stacks. Items with this status show up on the Pick List report. This report shows you which items you need to retrieve from the owning location and place on reserve. (For more information, see “Using a Pick List Report” on page 4-15.)</td>
</tr>
<tr>
<td>Reserve Bookroom (rb)</td>
<td>Reserve</td>
<td>An item with this status is checked in to the reserve location, but has been flagged for withdrawal from reserve. (For more information, see “Flagging Items for Withdrawal” on page 6-16.)</td>
</tr>
<tr>
<td>Checked In (i)</td>
<td>Owning (main)</td>
<td>An item with this status is checked in at the main location. After you retrieve the item from the owning location, you can place it on reserve. (For more information, see “Placing an Item on Reserve” on page 4-7.)</td>
</tr>
<tr>
<td>Checked In (i)</td>
<td>Reserve</td>
<td>An item with this status has been placed on reserve and is available for circulation at the reserve location.</td>
</tr>
<tr>
<td>Reserve withdrawal (rw)</td>
<td>Reserve</td>
<td>An item with this status has been flagged for withdrawal from reserve. After the item is returned, you can withdraw it from the reserve location and return it to the main location or owner. When you check in an item that has been flagged for withdrawal, Horizon updates the item status to “rw.” Items with this status show up on the Pull List report. This report shows you which items you need to remove from the reserve location. (For more information, see “Using a Pull List Report” on page 6-18.)</td>
</tr>
</tbody>
</table>
To determine reserve item statuses

1. Open the `item_status` view in the Table Editor. 

To do this, do these steps:

1. Double-click the Table Editor process in the Administration folder. 
2. Start entering “item_status” in the Mq View field. 
   The selection arrow moves to the view name that you want. 
3. Click OK.

Horizon opens the List Item Status window.

2. Highlight the item status you want to use for Reserve Bookroom.

3. Click Edit.

Horizon opens the Edit Item Status window:

4. Mark the Reserve box.

5. Save your changes.

6. Repeat steps 2 through 5 for each status you want to use for Reserve Bookroom.
Setting Up Reserve Bookroom Security

Horizon security lets you control access to Reserve Bookroom functions and processes and keep track of which users are performing the functions. You can determine which users can access a function by setting up passkey and role privileges related to Reserve Bookroom for each reserve location.

You may need to give users access to these passkey privileges:

<table>
<thead>
<tr>
<th>Passkey Privilege</th>
<th>Passkey Privilege</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access item archives</td>
<td>Delete instructor record</td>
</tr>
<tr>
<td>Access items list from ICT</td>
<td>Edit ICT record</td>
</tr>
<tr>
<td>Copy borrower record</td>
<td>Edit item</td>
</tr>
<tr>
<td>Copy course record</td>
<td>Flag item for reserve</td>
</tr>
<tr>
<td>Copy instructor record</td>
<td>Flag items for withdrawal</td>
</tr>
<tr>
<td>Create new ICT record</td>
<td>Link course to instructor</td>
</tr>
<tr>
<td>Create new item</td>
<td>Link instructor to course</td>
</tr>
<tr>
<td>Create short bib</td>
<td>Print spine labels</td>
</tr>
<tr>
<td>Delete course record</td>
<td>Unarchive an item</td>
</tr>
</tbody>
</table>

You may need to give users access to these role privileges:

<table>
<thead>
<tr>
<th>Role Privilege</th>
<th>Role Privilege</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Titles</td>
<td>Items Withdraw</td>
</tr>
<tr>
<td>Course Edit</td>
<td>Location Switch</td>
</tr>
<tr>
<td>Course New</td>
<td>Pick List Cumulative Report</td>
</tr>
<tr>
<td>Instructor Edit</td>
<td>Pick List Prepare and Show</td>
</tr>
<tr>
<td>Instructor Letter Withdrawal</td>
<td>Pick List Show</td>
</tr>
<tr>
<td>Instructor New</td>
<td>Pull List Withdrawal</td>
</tr>
<tr>
<td>Items Reserve</td>
<td>Set Defaults</td>
</tr>
</tbody>
</table>

(For more information about passkey and role privileges, and instructions on securing Reserve Bookroom functions, see the “Securing Horizon” section in the “Security and Preferences” chapter of the System Administration Guide.)
Chapter 3

Setting Up Course and Instructor Records

This chapter explains how to work with Instructor and Course records in Reserve Bookroom.

- About Setting Up Course and Instructor Records 3-3
- Setting Up or Changing an Instructor Record 3-4
- Setting Up or Changing a Course Record 3-6
- Adding a Course to an Instructor 3-8
- Adding an Instructor to a Course 3-10
- Removing an Instructor from a Course 3-12
- Removing a Course from an Instructor 3-13
About Setting Up Course and Instructor Records

Reserve records let you keep track of instructors and courses for which you reserve items. You can reserve items for any instructor that is associated with a course. (For example, if an instructor employs an aide to help teach a course, you can create an Instructor record for the aid and reserve items for the course he or she teaches.)

Course records contain details about a course, such as the course name, description, and number of instructors that teach the course. Instructor records contain details about an instructor, such as the instructor’s name, address (office and department), instructor number, and other information.

IMPORTANT

Remember that you must do all reserve tasks in the reserve location. (For instructions on switching to a reserve location, see “Switching to a Reserve Location” on page 1-12.)

This section explains these topics:

• Setting Up or Changing an Instructor Record
• Setting Up or Changing a Course Record
• Adding a Course to an Instructor
• Adding an Instructor to a Course
• Removing an Instructor from a Course
• Removing a Course from an Instructor
Setting Up or Changing an Instructor Record

Instructor records let you place items on reserve for instructors and let students search for reserve items by instructor. An Instructor record includes the instructor’s name and address or campus location. You can create new Instructor records as well as edit existing ones. If you already have information about an instructor in your Borrower records, you can copy the instructor’s information from the Borrower record to the Instructor record.

To set up or change an instructor record

1. Do one of these options:

<table>
<thead>
<tr>
<th>Add a new instructor</th>
<th>Copy a Borrower record</th>
<th>Edit an Instructor record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start the <strong>New Instructor</strong> process. The default location of this process is the <strong>Reserve Bookroom\Instructor</strong> folder on the navigation bar.</td>
<td>1 Start the <strong>New Instructor</strong> process. The default location of this process is the <strong>Reserve Bookroom\Instructor</strong> folder on the navigation bar. Horizon opens the Edit Reserve Instructor window. 2 Click <strong>Copy Borrower</strong>. 3 Search for the instructor as a borrower. (For instructions, see “Searching for an Instructor” on page 1-19.) 4 If Horizon displays a list of borrowers, choose the instructor from the list. 5 Click <strong>OK</strong>. Horizon imports the information into the Instructor record.</td>
<td>If you want to change information for an existing instructor, search for the instructor. (For instructions, see “Searching for an Instructor” on page 1-19.)</td>
</tr>
</tbody>
</table>
Horizon opens the Edit Reserve Instructor window:

2 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the instructor’s name.</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Enter the first line of the instructor’s address.</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>Enter the second line of the instructor’s address.</td>
</tr>
<tr>
<td>Address Line 3</td>
<td>Enter the third line of the instructor’s address.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter any comments about the instructor.</td>
</tr>
</tbody>
</table>

3 Save your changes.
Setting Up or Changing a Course Record

Course records let you reserve items for an instructor for a specific course he or she teaches. A Course record includes the course’s name and description. Students can search for reserve items based on the course name or description. You can create new Course records as well as edit existing ones. If necessary, you can assign more than one name to the same course. (For example, the same calculus course may be listed as both Mathematics 300 and Physics 328.)

To set up or change a course record

1. Do one of these options:

<table>
<thead>
<tr>
<th>Add a new course</th>
<th>Edit a Course record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start the New Course process. The default location of this process is the Reserve Bookroom\Course folder on the navigation bar.</td>
<td>If you want to change information for an existing course, search for the course. (For instructions, see “Searching for a Course” on page 1-18.)</td>
</tr>
</tbody>
</table>

Horizon opens the Edit Reserve Course window:

- For a new course, Horizon automatically assigns the course number.
- For a new course, Horizon automatically assigns the course group number.
- If you save this record without entering a group description, Horizon enters the course description in this field.
2 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Location          | Enter the location where you want to store this record, or click Codes to choose from a list.  
                     (For example, enter “main reserve”.)                                                                 |
| Course Name       | Enter the name of the course.  
                     (For example, enter “Math 101”.)                                                                 |
| Description       | Enter a description of the course.  
                     (For example, enter “Math Theory required for all freshmen”.)                                                                 |
| Comment           | Enter any comments about the course.                                                                                                                                 |
| Group Description | If this course has multiple names, or sections, enter a description for the group of course names.  
                     (For example, enter “Introduction to math theory”.)                                                                 |

3 Save your changes.  
If you add a new course, Horizon automatically assigns the course number and group number.

4 If the course has multiple names, or sections, do these steps:

1 In the Course Info group, click New.  
   Horizon displays a blank record.

2 Enter the alternate name in the Course Name field.

3 Complete the remaining fields with new information or the same information you entered in step 2 of this task.

4 Save your changes.  
   Horizon adds the new course name and information:
Chapter 3: Setting Up Course and Instructor Records

Adding a Course to an Instructor

Before you can reserve items for an instructor, you must link one or more courses to the instructor. Once you link these records, the course remains linked to the instructor. You can have more than one instructor linked to the same course. (For instructions, see “Adding an Instructor to a Course” on page 3-10.)

To add a course to an instructor

1. Search for the instructor to whom you want to add the course.
2. If Horizon displays a list of instructors, choose the one you want.
3. Click Titles.

Horizon displays the courses and titles linked to the instructor:

4. Click Find Course.

Horizon displays the List Reserve Course window.
5. Choose the course you want to add to the instructor.
6. Click Found.
Adding a Course to an Instructor

If your Add Course to Instructor default is set to “add all or selected titles”, Horizon displays the Select Titles for Course window:

(For instructions on setting session defaults, see “Setting Reserve Session Defaults” on page 1-13.)

7 If Horizon displays the Select Titles for Course window, do one of these options:
   - If you want to link only certain titles to the instructor, highlight the titles, then click Add.
   - If you want to link all of the titles to the instructor, click Add All.

Horizon adds the course and selected titles to the instructor:
Chapter 3: Setting Up Course and Instructor Records

Adding an Instructor to a Course

If a course is taught by more than one instructor, you can link additional instructors to the course. (For example, an instructor might have an assistant that teaches a course, or a different instructor might teach the course depending on the semester.) You can reserve items for all instructors linked to a course.

To add an instructor to a course

1. Search for the course to which you want to add the instructor.
2. If Horizon displays a list of courses, choose the one you want.
3. Click Titles.

Horizon displays the instructors and titles linked to the course:

4. Click Add Instr.
   Horizon displays the List Reserve Instructor window.
5. Choose the instructor whom you want to add to the course.
6. Click Found.
If your Add Instructor to Course default is set to “add all or selected titles”, Horizon displays the Select Titles for Instructor window:

7 If Horizon displays the Select Titles for Instructor window, do one of these options:
   • If you want to link only certain titles to the instructor, highlight the titles, then click Add.
   • If you want to link all of the titles to the instructor, click Add All.

Horizon adds the instructor and selected titles to the course:
Chapter 3: Setting Up Course and Instructor Records

Removing an Instructor from a Course

If necessary, you can remove an instructor from a course without deleting the Instructor record from Reserve Bookroom. (For example, you may want to remove an instructor from a course if the instructor no longer teaches that course.)

To remove an instructor from a course

1. Search for the course from which you want to remove the instructor.
2. Click Titles.
   Horizon displays the Titles for Course window:

   ![Chapter 3: Setting Up Course and Instructor Records](image1)

   Two instructors teach this course.

3. Highlight the instructor whom you want to unlink from the course.
4. If there are any titles attached to the instructor, unlink each title.
   (For instructions, see “Unlinking a Reserve Title” on page 6-21.)
   Horizon automatically removes the instructor from the course.

   ![Chapter 3: Setting Up Course and Instructor Records](image2)

   There is now only one instructor for this course.
Removing a Course from an Instructor

If necessary, you can remove a course from an instructor without deleting the Course record from Reserve Bookroom. (For example, you may want to remove a course from an instructor if the instructor no longer teaches that course.)

To remove a course from an instructor

1. Search for the instructor from whom you want to remove the course.
2. Click Titles.
   Horizon displays the Titles for Instructor window:
   
   ![Instructor Title Window]
   
   This instructor teaches two courses.

3. Highlight the course that you want to unlink from the instructor.
4. If there are any titles attached to the course, unlink each title.
   (For instructions, see “Unlinking a Reserve Title” on page 6-21.)
   Horizon automatically removes the course from the instructor.

   ![Instructor Title Window with Course Unlinked]
   
   This instructor now teaches only one course.
This chapter explains how to prepare items that your library owns for reserve. It also explains how to place these items on reserve.
About Reserving Library-Owned Items

After you create Instructor and Course records, you can place items from your library catalog on reserve. You can reserve an item for an instructor or course after you retrieve the item from your main location. You may require an instructor to bring the item to the reserve location or you may have staff members that search for items that instructors want to place on reserve.

Once you place an item on reserve, you can circulate reserve items according to the circulation parameters you set up for your reserve location and the ITYPE of reserve items. (For more information, see “Defining Reserve Circulation Privileges” on page 2-5.)

If a library-owned item is currently checked out, but you need to place it on reserve, you can flag the item for reserve. When the item is checked in at the circulation desk, Horizon prompts staff members to place the item on reserve.

**IMPORTANT**

Remember that you must do all reserve tasks in the reserve location. (For instructions on switching to a reserve location, see “Switching to a Reserve Location” on page 1-12.)

This chapter explains these topics:

- Creating a Reserve Title Record
- Placing an Item on Reserve
- Flagging Items for Reserve
- Using a Pick List Report
- Editing Reserve Information for a Title
- Changing Reserve Item Records
Chapter 4: Reserving Library-Owned Items

Creating a Reserve Title Record

Before you can reserve items for an instructor, you need to link the titles of the items to a course that the instructor teaches. You can link existing titles from your library catalog to an instructor or course. Horizon creates an Instructor/Course/Title (ICT) record that links an instructor, course, and title together. Users can then search for items by instructor, course, or title.

To create a reserve Title record

1. Search for the course to which you want to link a title.

   You can also create a reserve Title record by first searching for the instructor and then choosing the course that you want to add the title to.

2. Choose the course that you want to add the titles to.

3. Click Titles.

   Horizon displays the instructors and titles for the course.

4. Highlight the instructor to whom you want to add titles.

   Horizon displays a list of titles linked to the instructor:
5 Click New.
Horizon displays the Identify a Title window:

6 Click Search PAC.
7 Search for the title you want.
   (For instructions, see the “Searching” chapter of the Horizon Basics Guide.)
8 Highlight the title you want.
9 Press F10 or choose Edit, Send to.
   Horizon opens the Send To dialog box.
10 Double-click the process to which you want to send the title.
   Horizon opens the Edit Reserve Title window:

   Horizon supplies any default information that you set up for this session.
   (For more information, see “Setting Reserve Session Defaults” on page 1-13.)
11 Complete or update these fields and options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. Required</td>
<td>Enter the number of copies of the title that you need to place on reserve.</td>
</tr>
<tr>
<td>Reserve Date</td>
<td>Enter the date when you want to place this title on reserve.</td>
</tr>
<tr>
<td>Withdrawal Date</td>
<td>Enter the date when you want to withdraw this title from reserve.</td>
</tr>
<tr>
<td>Reactivation Date</td>
<td>Enter the date when you want to place this title on reserve again.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter any comments (up to 255 characters) about the title. (For example, if you have several volumes for one title, enter “vol. 3”.)</td>
</tr>
<tr>
<td>Status</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want to place this title on reserve, or you want users to be able to search for the title, mark <strong>Active</strong>.</td>
</tr>
<tr>
<td></td>
<td>• If you do <em>not</em> want to place this title on reserve, or you do <em>not</em> want users to be able to search for the title, mark <strong>Inactive</strong>.</td>
</tr>
<tr>
<td>Maximum Needed</td>
<td>Enter the maximum number of copies that you need to place on reserve.</td>
</tr>
</tbody>
</table>

12 Save your changes.
Horizon links the title to the instructor and course.
Placing an Item on Reserve

When you place an item on reserve, Horizon updates the item status to “checked in” in the reserve location. You can then begin circulating the item in Reserve Bookroom. At this time, you can temporarily change the item’s ITYPE, call number, and collection if necessary. When you withdraw the item from reserve, Horizon restores the owning location, ITYPE, call number, and collection on the Item record.

This section explains these topics:
- Reserving a Single Item
- Reserving a Group of Items

Reserving a Single Item

After you retrieve an item, you can place the item on reserve when you link the item’s title to a Course or Instructor record.

Before You Begin

Make sure there is an active Title record for the item you want to place on reserve. (For instructions on changing the status, see “Editing Reserve Information for a Title” on page 4-16.)

To reserve a single item

1. If you have not already done so, create a Title record for the item. (For instructions, see “Creating a Reserve Title Record” on page 4-4.)
2. On the Edit Reserve Title window, click Items. Horizon lists all of the copies (items) for this title:

   ![Items for: The first show: painting and sculpture from eight collecti...](image)

   Location/Copy  | Collection  | Status/Call No.
   ---------------|-------------|----------------
   1. Creggan Library | Main Stack | NS02D_L6_MS_1983 Checked In

3. Highlight the item that you want to place on reserve.
4 Click **Place on Reserve**.

Horizon displays the **Edit Saved Item Variables** window:

![Edit Saved Item Variables](image)

**NOTE**

If you set up session defaults, Horizon may automatically complete some fields. (For more information, see “Setting Reserve Session Defaults” on page 1-13.)

5 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Type</td>
<td>Enter the item type (ITYPE) you want to use for this item in the reserve location, or click <strong>Codes</strong> to choose from a list.</td>
</tr>
<tr>
<td>Collection</td>
<td>Enter the collection that you want this item to belong to in the reserve location, or click <strong>Codes</strong> to choose from a list.</td>
</tr>
<tr>
<td>Call</td>
<td>Enter the call number for this item.</td>
</tr>
<tr>
<td>Copy Stmt.</td>
<td>Enter any comment about this copy. (For example, if this is one of three copies, enter “copy 3”.)</td>
</tr>
<tr>
<td>Check In Note</td>
<td>Enter a note for reserve staff who check in this item.</td>
</tr>
</tbody>
</table>
6 Save your changes.
The item is now checked in to the reserve location and available for circulation.

**Reserving a Group of Items**

If you have a large number of items that you need to place on reserve, and you have already created Title records for each item, you can retrieve the items and place them on reserve at the same time.

**Before You Begin**

Make sure there is an active Title record for the item you want to place on reserve. (For instructions on changing the status, see “Editing Reserve Information for a Title” on page 4-16.)
To reserve a group of items

1 Start the Place Items on Reserve process.

The default location of this process is the Reserve Bookroom\ Reserve folder on the navigation bar.

Horizon opens the Place Items on Reserve window:

2 Do one of these options:

- Enter the item’s barcode in the Barcode field, then click OK.
- Scan the item’s barcode.

Horizon displays the Edit Saved Item Variables window:

When you place a library-owned item on reserve, Horizon saves the owning location so that you can return the item after you withdraw it from reserve.

When you place a library-owned item on reserve, Horizon temporarily moves the Item record to the reserve location.

NOTE

If you set up session defaults, Horizon may automatically complete some fields. (For more information, see “Setting Reserve Session Defaults” on page 1-13.)
3 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Type</td>
<td>Enter the item type (ITYPE) you want to use for this item in the reserve location, or click <strong>Codes</strong> to choose from a list.</td>
</tr>
<tr>
<td>Collection</td>
<td>Enter the collection that you want this item to belong to in the reserve location, or click <strong>Codes</strong> to choose from a list.</td>
</tr>
<tr>
<td>Call</td>
<td>Enter the call number for this item.</td>
</tr>
<tr>
<td>Copy Stmt.</td>
<td>Enter any comment about this copy. (For example, if this is one of three copies, enter “copy 3”.)</td>
</tr>
<tr>
<td>Check In Note</td>
<td>Enter a note for reserve staff who check in this item.</td>
</tr>
</tbody>
</table>

4 Save your changes.

Horizon adds the item to a list of reserve items:

5 If you want to edit the Item or Title record, do these steps:

1 Highlight the item, then click **Edit Item**.
   (For instructions on editing the Item record, see “Editing the Item Record While Placing an Item on Reserve” on page 4-19.)
2 Highlight the item, then click **Title Record**.
   (For instructions, on editing a reserve title, see “Using a Pick List Report” on page 4-15.)
Repeat steps 2 through 5 for each item that you want to place on reserve.

Click Close.

Flagging Items for Reserve

When you place items on reserve, you must retrieve the items from the owning location and store them at the reserve location. If your library owns these items and they are normally located in the library’s main stacks, you can flag the item record for these items to indicate they need to be placed on reserve. If an item is currently checked out, Horizon alerts staff members when the item is returned that it needs to be placed on reserve. (You can customize the text of this message. For instructions, see “Setting Up a Reserve Location Record” on page 2-3.)

When you flag an item for reserve, Horizon changes the item’s status to “rb” (reserve bookroom) and adds the item to a Pick List. You can then print the Pick List to use as a reference to retrieve the items. (For instructions, see “Using a Pick List Report” on page 4-15.)

Before You Begin

Make sure the Title record for the item you want to place on reserve has an “Active” status; otherwise, you cannot search for the item in reserve. (For instructions on changing the status, see “Editing Reserve Information for a Title” on page 4-16.)

To flag items for reserve

1. Search for the instructor or course linked to the title that you want to reserve.
2. Highlight the course or instructor with the title you want.
3. Click Edit.
   Horizon displays the Edit Reserve Title window.
4 Click **Items**.

Horizon lists all of the copies (items) for this title:

This item is currently checked in at the main location and stored in the main stacks.

5 Highlight the item that you want to flag for reserve.

6 Click **Flag for Reserve**.

Horizon opens the Edit Saved Item Variables window:

When you flag a library-owned item for reserve, Horizon changes the item status to "rb."

**NOTE**

If you set up session defaults, Horizon may automatically complete some fields. (For more information, see “Setting Reserve Session Defaults” on page 1-13.)
7 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Type</td>
<td>Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Collection</td>
<td>Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Call</td>
<td>Enter the call number for this item.</td>
</tr>
<tr>
<td>Copy Stmt.</td>
<td>Enter any comment about this copy. (For example, if this is one of three copies, enter “copy 3”.)</td>
</tr>
<tr>
<td>Check In Note</td>
<td>Enter a note for reserve staff who check in this item.</td>
</tr>
</tbody>
</table>

8 Save your changes.
Horizon changes the item status to Reserve Bookroom:

The item status indicates this item is flagged for reserve, even though it is still located in the main library.

9 When the item becomes available, place it on reserve.
(For instructions, see “Placing an Item on Reserve” on page 4-7.)
Using a Pick List Report

After you flag an item for reserve, you can generate and print a Pick List report. This report lists all of the items that you need to retrieve from other locations, such as the owning location, and place on reserve. You can choose the location for which you want to generate the Pick List. After you retrieve the items, you can use a Pick List to place the items on reserve.

You can generate these types of Pick Lists:

- **Prepare and Show.** Lets you generate a list of items that are checked in to another location and that you need to retrieve and place on reserve. Horizon flags each item for reserve and changes the item status to “rb” (reserve bookroom).
- **Show.** Lets you generate a list of items from a previous Pick List, that have not yet been placed on reserve. This type of Pick List is useful when a Pick List has been prepared, but not yet printed.
- **Cumulative.** Lets you generate a list of items with a reserve bookroom (rb) status at another location.

**To use a Pick List report**

1. Start one of these Pick List processes:
   - Pick List: Prepare and Show
   - Pick List: Show
   - Pick List: Cumulative

   The default location of these processes is the Reserve Bookroom\Reports folder on the navigation bar.

   Horizon displays the List Reserve Bookroom Pick List window:

   ![List Reserve Bookroom Pick List](image)

   The Pick List lists the items that you need to place on reserve from the location you choose.

2. If you want to print the list, choose File, Print.
3 If you want to place an item on reserve, highlight the item, then click **Place on Reserve**.

Horizon changes the item status and places the item on reserve:

<table>
<thead>
<tr>
<th>Title/Collection/Coll No.</th>
<th>Copy</th>
<th>Barcode/No/Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Applied economics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>mainst.  HD171 .A92 1988</td>
<td></td>
<td>m09041</td>
</tr>
<tr>
<td>2. Music at the White House: a history of the American</td>
<td></td>
<td></td>
</tr>
<tr>
<td>mainst.  ML200 S .W3 K57</td>
<td></td>
<td>m04799</td>
</tr>
<tr>
<td>3. Children and self-teaching /</td>
<td></td>
<td></td>
</tr>
<tr>
<td>mainst.  ND32 .S46 1985</td>
<td></td>
<td>m01100</td>
</tr>
<tr>
<td>4. Grounds of liability: an introduction to the philosophy of</td>
<td></td>
<td></td>
</tr>
<tr>
<td>mainst.  PD2 .ASS BMN4</td>
<td></td>
<td>m05340</td>
</tr>
<tr>
<td>5. Capricorn concerto: Essay no. 1 for orchestra /</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>mainst.  10388</td>
<td></td>
<td>m08038</td>
</tr>
</tbody>
</table>

This item is now checked in at the reserve location.

4 Close the List Reserve Bookroom Pick List window.

### Editing Reserve Information for a Title

After you link a title to an instructor, or place an item on reserve, you can edit the reserve information for the title. You can do this at any time as changes become necessary. (For example, you may need to postpone the date when you want to place an item on reserve, or cancel the reactivation date.)

**To edit reserve information for a title**

1 Search for the instructor linked to the title that you want to edit.

**NOTE**

You can also edit reserve information for titles by first searching for a course, then choosing the instructor linked to the title you want to edit.

Horizon displays the List Reserve Instructor window.

2 Choose the instructor linked to the title that you want to edit.

3 Click **Titles**.

Horizon displays the courses and titles for the instructor.

4 Highlight the course linked to the title that you want to edit.
Horizon displays a list of titles linked to the course:

5 Highlight the title you want to edit.
6 Click Edit.

Horizon displays the Edit Reserve Title window:

7 Complete or update these fields and options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. Required</td>
<td>Enter the number of copies of the title that you need to place on reserve.</td>
</tr>
<tr>
<td>Reserve Date</td>
<td>Enter the date when you want to place this title on reserve.</td>
</tr>
<tr>
<td>Withdrawal Date</td>
<td>Enter the date when you want to withdraw this title from reserve.</td>
</tr>
</tbody>
</table>
Chapter 4: Reserving Library-Owned Items

In this field | Do this
---|---
Reactivation Date | Enter the date when you want to place this title on reserve again.
Comment | Enter any comments (up to 255 characters) about the title.
Status | Do one of these options:
- If you want to place this title on reserve, or you want users to be able to search for the title, mark Active.
- If you do not want to place this title on reserve, or you do not want users to be able to search for the title, mark Inactive.
Maximum needed | Enter the maximum number of copies that you need to place on reserve.

8 Save your changes.
Horizon displays the Titles for Instructor window.

9 Repeat steps 5 through 8 for each title that you want to edit.

Changing Reserve Item Records

You can edit Item records for items after you place them on reserve or at the same time you place them on reserve. (An Item record represents a specific copy of a title.) When you place an item from your library catalog on reserve, you create a Reserve record for the item. After you place the item on reserve, you can edit information about the item. (For example, if you have more than one reserve location, you may need to change the reserve location.) This is also important if you need to change the item type (ITYPE) in order to change the loan period or other circulation privileges. (For example, you may let borrowers check out a book for two months from the main location, but for only one week or five hours from the reserve location.) You can also assign an owner to an item. (An owner is any individual or institution that owns an item.)

This section explains these topics:
- Editing the Item Record While Placing an Item on Reserve
- Editing the Item Record After Placing an Item on Reserve
- Assigning an Owner to a Reserve Item
Editing the Item Record While Placing an Item on Reserve

If you need to, you can change information in the item record for an item that you are in the process of placing on reserve. (For example, you may need to give the item a temporary barcode while it is in the reserve location, or you may need to change the withdrawal instructions.)

To edit the Item record while placing an item on reserve

1. Place the item on reserve.
   (For instructions, see “Placing an Item on Reserve” on page 4-7.)
2. At the Place Items on Reserve window, click Edit Item.
   Horizon displays the Edit Place Items on Reserve window:

   ![Edit Place Items on Reserve Window]

3. Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Barcode</td>
<td>Enter or edit the barcode of the item.</td>
</tr>
<tr>
<td>Item Type</td>
<td>Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Collection</td>
<td>Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Call No.</td>
<td>Enter the call number for this item.</td>
</tr>
</tbody>
</table>
Chapter 4: Reserving Library-Owned Items

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Type</td>
<td>Enter the type or call number for this item, or click Codes to choose from a list. (For example, the item may have a Dewey call number.)</td>
</tr>
<tr>
<td>Copy Stmt.</td>
<td>Enter any comment about this copy. (For example, if this is one of three copies, enter “copy 3”.)</td>
</tr>
<tr>
<td>Notes</td>
<td>Enter any notes about the item.</td>
</tr>
</tbody>
</table>

4 Click Page Down or resize the window to display these fields:
5 Complete or update these fields and options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| On Withdr    | Choose one of these options:  
|              | • **None.** If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option.  
|              | • **Discard Item.** If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option.  
|              | • **Discard Item and Bib.** If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option.  
|              | • **Archive Item.** If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option.  
|              | • **Archive Item and Bib.** If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option.  
|              | (If more than one item is linked to the title, you cannot archive the Title record.) |

*WARNING*

If you are working with library-owned items, do not mark the “Discard Item” or “Discard Item and Bib” options; otherwise, when you withdraw library-owned items, Horizon deletes the Item or Title records from your system. (For more information, see “Choosing a Withdrawal Cataloging Action” on page 6-10.)

| Withdr Instr | Click **Codes** and choose the withdrawal instruction that you want to use for these items, or to create new instructions.  
|             | (For more information, see “Setting Up Withdrawal Instructions” on page 6-4.) |
| Check In Note | Enter a note for reserve staff who check in this item. |

6 Save your changes.
Editing the Item Record After Placing an Item on Reserve

If necessary, you can change information in the item record for an item that you have already placed on reserve. (For example, you may need to give the item a temporary barcode while it is in the reserve location, or you may need to change the withdrawal instructions.)

To edit the Item record after placing an item on reserve

1. Search for the instructor or course linked to the titles that you want to change.
2. Highlight the course or instructor linked to the title that you want.
3. Highlight the title that you want.
4. Click Edit.
   Horizon displays the Edit Reserve Title window.
5. Click Items.
   Horizon lists all of the copies (items) for this title:

6. Highlight the item that you want to edit.

IMPORTANT

Make sure that the item you choose is located in the reserve library; otherwise, you may inadvertently edit an item that belongs to another location.
7 Click **Edit**.
Horizon displays the Edit Item Edit for RBR window:

8 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Barcode</td>
<td>Enter or edit the barcode of the item.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter the reserve location for this item, or click <strong>Codes</strong> to choose from a list.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>If you placed the item on reserve, changing the reserve location does not change the owning location for an item. Horizon saves the owning location so that you can return the item when you withdraw it from reserve.</td>
</tr>
<tr>
<td>Item Type</td>
<td>Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click <strong>Codes</strong> to choose from a list.</td>
</tr>
<tr>
<td>Collection</td>
<td>Enter the collection that you want this item to belong to in the reserve location, or click <strong>Codes</strong> to choose from a list.</td>
</tr>
<tr>
<td>Call No.</td>
<td>Enter the call number for this item.</td>
</tr>
<tr>
<td>Copy Stmt.</td>
<td>Enter any comment about this item. (For example, if this is one of three copies, enter “copy 3”.)</td>
</tr>
<tr>
<td>Notes</td>
<td>Enter any notes about the item.</td>
</tr>
</tbody>
</table>
9 Click **Page Down** or resize the window to display these fields:

![Edit Item Window](image)

Horizon saves the owning location, ITYPE, collection, and call number so that you can return the item after you withdraw it from reserve.

10 Complete or update these fields and options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>On Withdr</strong></td>
<td>Choose one of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>None.</strong> If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Discard Item.</strong> If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Discard Item and Bib.</strong> If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Archive Item.</strong> If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Archive Item and Bib.</strong> If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option.</td>
</tr>
</tbody>
</table>

(If more than one item is linked to the title, you cannot archive the Title record.)

---

*WARNING*

If you are working with library-owned items, do not mark the “Discard Item” or “Discard Item and Bib” options; otherwise, when you withdraw library-owned items, Horizon deletes the Item or Title records from your system. (For more information, see “Choosing a Withdrawal Cataloging Action” on page 6-10.)
Changing Reserve Item Records

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Withdr Instr</td>
<td>Click Codes and choose the withdrawal instruction that you want to use for these items, or to create new instructions. (For more information, see “Setting Up Withdrawal Instructions” on page 6-4.)</td>
</tr>
<tr>
<td>Check In Note</td>
<td>Enter a note for reserve staff who check in this item.</td>
</tr>
</tbody>
</table>

11 Click **Page Down** or resize the window to display these fields:

![Edit Item Edit for RBR](image)

12 Complete this field:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Type</td>
<td>Enter the type or call number for this item, or click Codes to choose from a list. (For example, the item may have a Dewey call number.)</td>
</tr>
</tbody>
</table>

13 Save your changes.
Assigning an Owner to a Reserve Item

If you want to, you can assign an owner to a reserve item. (An owner is any individual or institution that owns an item.) You can choose an owner from the list of instructors, or you can create a new owner.

Assigning an owner to a reserve item may be helpful if the owner of an item is different than the instructor who wants to reserve the item. It may also be helpful if you have a generic instructor, such as "English Department", and the item belongs to an individual faculty member (for example, "Dr. Peer").

In addition to the withdrawal instructions, an owner can indicate to reserve staff members what to do with an item after withdrawing it. (For example, the withdrawal instructions may be "Return Item to Owner" or "Inform owner item is no longer on reserve").

To assign an owner to a reserve item

1. Search for the instructor or course linked to the titles that you want to change.
2. Highlight the course or instructor linked to the title that want.
3. Highlight the title that you want.
4. Click Edit.
   Horizon displays the Edit Reserve Title window.
5. Click Items.
   Horizon lists all of the copies (items) for this title:

6. Highlight the item to which you want to assign an owner.
7 Click **Edit**.

Horizon displays the Edit Item Edit for RBR window:

8 Click **Owner**.

Horizon displays the List Reserve Instructor window.

9 Do one of these options:

<table>
<thead>
<tr>
<th>Choose an owner from the list of instructors</th>
<th>Create a new owner</th>
</tr>
</thead>
</table>
| 1 Highlight the instructor you want.  
2 Click **Find**.  
Horizon displays the Owner Instr field on the Edit Item Edit for RBR window: | 1 Click **New**.  
Horizon displays the Edit Reserve Instructor window: |
| 3 Save your changes. | 2 Complete the fields.  
(For instructions, see “Setting Up or Changing an Instructor Record” on page 3-4.)  
3 Save your changes. |
Chapter 5

Reserving Other Items

This chapter explains how to prepare items that your library does not own for reserve (for example, an instructor’s personal copy). It also explains how to place the items on reserve.

- About Reserving Other Items 5-3
- Creating a Reserve Title Record 5-4
- Placing an Item on Reserve 5-7
- Editing Reserve Information for a Title 5-12
- Changing Reserve Item Records 5-14
About Reserving Other Items

After you create an Instructor and Course record, you can place items on reserve for an instructor, even if your library does not own the items. (For example, the instructor may want to make a copy of a test available to students on a certain day.) After you receive the item from the instructor, you can create a Short Bib record for the item as well as an Item record. You can then place the item on reserve.

Once you place an item on reserve, you can circulate reserve items according to the circulation parameters you set up for your reserve location and the ITYPE of reserve items. (For more information, see “Defining Reserve Circulation Privileges” on page 2-5.)

IMPORTANT

Remember that you must do all reserve tasks in the reserve location. (For instructions on switching to a reserve location, see “Switching to a Reserve Location” on page 1-12.)

This chapter explains these topics:

- Creating a Reserve Title Record
- Placing an Item on Reserve
- Editing Reserve Information for a Title
- Changing Reserve Item Records
Creating a Reserve Title Record

Before you can reserve an item for an instructor, you need to link the title of the item to a course that the instructor teaches. You can create a Short Bib record for any title that your library does not own. (For example, an instructor may want you to place on reserve a personal copy of *A Tale of Two Cities.* ) Horizon creates an Instructor/Course/Title (ICT) record that links the instructor, course, and title together. Users can then search for the items by instructor, course, or title.

To create a reserve Title record

1. Search for the instructor to whom you want to link a title.

   NOTE

   You can also create a reserve Title record by first searching for the course and then choosing the instructor to whom you want to add.

2. Choose the instructor to whom you want to add the title.

3. Click Titles.

   Horizon displays the courses and titles for the instructor.

4. Highlight the course that you want to add the title to.

   Horizon displays a list of titles linked to the instructor:
Creating a Reserve Title Record

5 Click New.
Horizon displays the Identify a Title window:

![Identify a Title window]

6 Click Create Short Bib.
Horizon displays the Edit Short Bib window:

![Edit Short Bib window]

7 Complete these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>Enter the author of this title.</td>
</tr>
<tr>
<td>ISSN</td>
<td>Enter the ISSN of this title.</td>
</tr>
<tr>
<td>Title</td>
<td>Enter the title.</td>
</tr>
</tbody>
</table>

**NOTE**

In order to edit the title, author, ISBN, ISSN, and other title information after you place an item on reserve, you must have cataloging privileges. (For more information about setting up these privileges, see “Securing Horizon” in the “Security and Preferences” chapter of the *System Administration Guide*.)
Chapter 5: Reserving Other Items

8 Click OK.
Horizon opens the Edit Reserve Title window:

Horizon supplies any default information you set up for this session. (For more information, see “Setting Reserve Session Defaults” on page 1-13.)

9 Complete or update these fields and options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. Required</td>
<td>Enter the number of copies of the title that you need to place on reserve.</td>
</tr>
<tr>
<td>Reserve Date</td>
<td>Enter the date when you want to place this title on reserve.</td>
</tr>
<tr>
<td>Withdrawal Date</td>
<td>Enter the date when you want to withdraw this title from reserve.</td>
</tr>
<tr>
<td>Reactivation Date</td>
<td>Enter the date when you want to place this title on reserve again.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter any comments (up to 255 characters) about the title.</td>
</tr>
<tr>
<td></td>
<td>(For example, if you have several volumes for one title, enter “vol. 3”.)</td>
</tr>
<tr>
<td>Status</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want to place this title on reserve, or you want users to be able to search for the title, mark Active.</td>
</tr>
<tr>
<td></td>
<td>• If you do not want to place this title on reserve, or you do not want users to be able to search for the title, mark Inactive.</td>
</tr>
<tr>
<td>Maximum Needed</td>
<td>Enter the maximum number of copies (items) that you need to place on reserve.</td>
</tr>
</tbody>
</table>

10 Save your changes.
Horizon links the title to the instructor and course.
Placing an Item on Reserve

You need to create an Item record for non library-owned items that you want to place on reserve. (For example, you may need to create an Item record for an instructor’s personal copy of *A Tale of Two Cities*.) The Item record includes a barcode and other identifying information that lets you circulate the item in Reserve Bookroom. When you create an Item record in the reserve location, Horizon automatically places the item on reserve.

Before You Begin

Make sure there is an active Title record for the item you want to place on reserve. (For instructions on changing the status, see “Editing Reserve Information for a Title” on page 5-12.)

To place an item on reserve

1. If you have not already done so, create a reserve Title record for the item. (For instructions, see “Creating a Reserve Title Record” on page 5-4.) Horizon displays the Edit Reserve Title window:

   ![Edit Reserve Title Window]

2. Click *Items*.
There are currently no items for this title:

3 Click New.

Horizon displays the Edit Item Edit for RBR window:

NOTE

If you set up session defaults, Horizon may automatically complete some fields. (For more information, see “Setting Reserve Session Defaults” on page 1-13.)
4 Complete these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Barcode</td>
<td>Enter or scan the barcode of the item.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter the reserve location for this item, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Item Type</td>
<td>Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Collection</td>
<td>Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Call No.</td>
<td>Enter the call number for this item.</td>
</tr>
<tr>
<td>Copy Stmt.</td>
<td>Enter any comment about this copy. (For example, enter “Copy 3”.)</td>
</tr>
<tr>
<td>Notes</td>
<td>Enter any notes about the item.</td>
</tr>
</tbody>
</table>

5 Click Page Down or resize the window to display these fields:
Complete these fields and options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>On Withdr</strong></td>
<td>Choose one of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>None.</strong> If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Discard Item.</strong> If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Discard Item and Bib.</strong> If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Archive Item.</strong> If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Archive Item and Bib.</strong> If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option.</td>
</tr>
<tr>
<td></td>
<td>(If more than one item is linked to the title, you cannot archive the Title record.)</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Choosing a Withdrawal Cataloging Action” on page 6-10.)</td>
</tr>
<tr>
<td><strong>Withdr Instr</strong></td>
<td>Click <strong>Codes</strong> and choose the withdrawal instruction that you want to use for these items, or to create new instructions.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Setting Up Withdrawal Instructions” on page 6-4.)</td>
</tr>
<tr>
<td><strong>Check In Note</strong></td>
<td>Enter a note for reserve staff who check in this item.</td>
</tr>
</tbody>
</table>
7 Click **Page Down** or resize the window to display these fields:

![Edit Item for RBR](image)

8 Complete this field:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Type</td>
<td>Enter the type or call number for this item, or click <strong>Codes</strong> to choose from a list. (For example, the item may have a Dewey call number.)</td>
</tr>
</tbody>
</table>

9 Save your changes.

   Horizon places the item on reserve.

10 If you need to place on reserve several copies of the same title, do these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From the Items For Title window, highlight the Item record that you want to copy.</td>
</tr>
<tr>
<td>2</td>
<td>Choose <strong>File, Copy Record</strong>. Horizon creates a new Item record.</td>
</tr>
<tr>
<td>3</td>
<td>If necessary, change any fields. (For example, you can change the item barcode or copy statement.)</td>
</tr>
<tr>
<td>4</td>
<td>Save your changes. Horizon places the item on reserve.</td>
</tr>
</tbody>
</table>
Chapter 5: Reserving Other Items

Editing Reserve Information for a Title

After you link a title to an instructor, or place an item on reserve, you can edit the reserve information for this title. You can do this at any time as changes become necessary. (For example, you may need to postpone the date when you want to place an item on reserve, or cancel the reactivation date.)

**IMPORTANT**

In order to edit the title, author, ISBN, ISSN, and other title information, you must have cataloging privileges. (For more information about setting up these privileges, see “Securing Horizon” in the “Security and Preferences” chapter of the System Administration Guide.)

To edit reserve information for a title

1. Search for the instructor linked to the title that you want to edit.

   **NOTE**
   
   You can also edit reserve information for titles by first searching for a course, then choosing the instructor linked to the title that you want to edit.

   Horizon displays the List Reserve Instructor window.

2. Choose the instructor linked to the title that you want to edit.

3. Click Titles.

   Horizon displays the courses and titles for the instructor.

4. Highlight the course linked to the title that you want to edit.

   Horizon displays a list of titles linked to the course:

   ![Image of a list of titles](image)

5. Highlight the title that you want.

6. Click Edit.
Horizon displays the Edit Reserve Title window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. Required</td>
<td>Enter the number of copies of the title that you need to place on reserve.</td>
</tr>
<tr>
<td>Reserve Date</td>
<td>Enter the date when you want to place this title on reserve.</td>
</tr>
<tr>
<td>Withdrawal Date</td>
<td>Enter the date when you want to withdraw this title from reserve.</td>
</tr>
<tr>
<td>Reactivation Date</td>
<td>Enter the date when you want to place this title on reserve again.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter any comments (up to 255 characters) about the title.</td>
</tr>
</tbody>
</table>
| Status            | Do one of these options:  
                    • If you want to place this title on reserve, or you want users to be able to search for the title, mark Active.  
                    • If you do not want to place this title on reserve, or you do not want users to be able to search for the title, mark Inactive. |
| Maximum needed    | Enter the maximum number of copies (items) that you need to place on reserve. |

7 Complete or update these fields and options:

8 Save your changes.

Horizon displays the Titles for Instructor window.

9 Repeat steps 5 through 8 for each title that you want to edit.
Changing Reserve Item Records

You can edit Item records for items after you place them on reserve. (An Item record represents a specific copy of a title.) When you place an item on reserve, you create a reserve record for the item. You can edit information about the item. (For example, if you have more than one reserve location, you may need to change the reserve location.) This is also important if you need to change the item type (ITYPE) in order to change the loan period or other circulation privileges. You can also assign an owner to an item. (An owner is any individual or institution that owns an item.)

This section explains these topics:

- Editing the Item Record after Placing an Item on Reserve
- Assigning an Owner to a Reserve Item

Editing the Item Record after Placing an Item on Reserve

If necessary, you can change information in the item record for an item that you have already placed on reserve. (For example, you may need to give the item a temporary barcode while it is in the reserve location, or you may need to change the withdrawal instructions.)

To edit the Item record for a reserve item

1. Search for the instructor or course linked to the titles that you want to change.
2. Highlight the course or instructor linked to the title that you want.
3. Highlight the title that you want.
4. Click **Edit**.
   Horizon displays the Edit Reserve Title window.
5. Click **Items**.
Horizon lists all of the copies (items) for this title:

6 Highlight the item that you want to edit.

**IMPORTANT**

Make sure the item that you highlight is located in the reserve library; otherwise, you may inadvertently edit an item that belongs to another location.

7 Click Edit.

Horizon displays the Edit Item Edit for RBR window:

---

**Horizon lists all of the copies (items) for this title:**

6 Highlight the item that you want to edit.

**IMPORTANT**

Make sure the item that you highlight is located in the reserve library; otherwise, you may inadvertently edit an item that belongs to another location.

7 Click Edit.

Horizon displays the Edit Item Edit for RBR window:
8 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Barcode</td>
<td>Enter or edit the barcode of the item.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter the reserve location for this item, or click Codes to choose from a list.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> Changing the reserve location does not change the owning location for an item. Horizon saves the owning location so that you can return the item when you withdraw it from reserve.</td>
</tr>
<tr>
<td>Item Type</td>
<td>Enter the item type (ITYPE) that you want to use for this item in the reserve location, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Collection</td>
<td>Enter the collection that you want this item to belong to in the reserve location, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Call No.</td>
<td>Enter the call number for this item.</td>
</tr>
<tr>
<td>Copy Stmt.</td>
<td>Enter any comment about this item. (For example, if this is one of three copies, enter “copy 3”.)</td>
</tr>
<tr>
<td>Notes</td>
<td>Enter any notes about the item.</td>
</tr>
</tbody>
</table>

9 Click **Page Down** or resize the window to display these fields:
Complete or update these fields and options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| On Withdr     | Choose one of these options:  
  • **None**. If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw these items, mark this option.  
  • **Discard Item**. If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw these items, mark this option.  
  • **Discard Item and Bib**. If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw these items, mark this option.  
  • **Archive Item**. If you want to archive the Item record in Reserve Bookroom when you withdraw these items, mark this option.  
  • **Archive Item and Bib**. If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw these items, mark this option.  
  
  (If more than one item is linked to the title, you cannot archive the Title record.)  
  
  (For more information, see “Choosing a Withdrawal Cataloging Action” on page 6-10.) |
| Withdr Instr  | Click **Codes** and choose the withdrawal instruction that you want to use for these items, or to create new instructions.  
  
  (For more information, see “Setting Up Withdrawal Instructions” on page 6-4.) |
| Check In Note | Enter a note for reserve staff who check in this item. |
11 Click Page Down or resize the window to display these fields:

![Image of the Edit Item window]

12 Complete this field:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Type</td>
<td>Enter the type or call number for this item, or click Codes to choose from a list. (For example, the item may have a Dewey call number.)</td>
</tr>
</tbody>
</table>

13 Save your changes.

---

**Assigning an Owner to a Reserve Item**

If you want to, you can assign an owner to a reserve item. (An owner is any individual or institution that owns an item.) You can choose an owner from the list of instructors, or you can create a new owner.

Assigning an owner to a reserve item may be helpful if the owner of an item is different than the instructor who wants to reserve the item. It may also be helpful if you have a generic instructor, such as “English Department”, and the item belongs to an individual faculty member (for example, “Dr. Peer”).

In addition to the withdrawal instructions, an owner can indicate to reserve staff members what to do with an item after withdrawing it. (For example, the withdrawal instructions may be “Return Item to Owner,” or “Inform owner item is no longer on reserve.”)

**To assign an owner to a reserve item**

1. Search for the instructor or course linked to the titles that you want to change.
2. Highlight the course or instructor linked to the title that you want.
3 Highlight the title that you want.

4 Click **Edit**.

Horizon displays the Edit Reserve Title window.

5 Click **Items**.

Horizon lists all of the copies (items) for this title:

6 Highlight the item to which you want to assign an owner.

7 Click **Edit**.

Horizon displays the Edit Item Edit for RBR window:

8 Click **Owner**.

Horizon displays the List Reserve Instructor window.
Chapter 5: Reserving Other Items

9 Do one of these options:

<table>
<thead>
<tr>
<th>Choose an owner from the list of instructors</th>
<th>Create a new owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Highlight the instructor that you want.</td>
<td>1 Click New.</td>
</tr>
<tr>
<td>2 Click Found.</td>
<td>Horizon displays the Edit Reserve Instructor window:</td>
</tr>
<tr>
<td>Horizon displays the Owner Instr field on the Edit Item Edit for RBR window:</td>
<td>2 Complete the fields.</td>
</tr>
<tr>
<td>3 Save your changes.</td>
<td>(For instructions, see “Setting Up or Changing an Instructor Record” on page 3-4.)</td>
</tr>
<tr>
<td></td>
<td>3 Save your changes.</td>
</tr>
</tbody>
</table>
Withdrawing Items from Reserve

This chapter explains how to prepare library-owned items and other items for withdrawal from Reserve Bookroom. It also explains how to withdraw these items and store Title and Item records in Reserve Bookroom after you withdraw them.

About Withdrawing Items from Reserve 6-3
Setting Up Withdrawal Instructions 6-4
Printing Instructor Letters 6-7
Inactivating a Reserve Title 6-9
Choosing a Withdrawal Cataloging Action 6-10
Withdrawing an Item from Reserve 6-14
Flagging Items for Withdrawal 6-16
Using a Pull List Report 6-18
Unarchiving an Item Record 6-18
Deleting Reserve Records 6-21
About Withdrawing Items from Reserve

After an item is on reserve for a certain period of time that you determine, you can withdraw the item from reserve. When you withdraw a library item from reserve you can return the item to the owning location—either your library’s main stacks or another collection. If you are withdrawing a non-library-owned item, you can return it to the instructor or owner. If a reserve item is checked out when you need to withdraw it from reserve, you can flag the item for withdrawal. When the item is checked in, Horizon prompts reserve staff members to withdraw the item.

When you withdraw an item from your reserve, you should inactivate the reserve Title record; otherwise, users will still be able to search for the title. You can also set up withdrawal instructions that prompt staff members to do something specific with that item (for example, return the item to the instructor).

When you withdraw an item from reserve, you can choose to archive the reserve Title and Item records for items that you will likely place on reserve again. (For example, an instructor may place a text book on reserve every other semester.) Archiving reserve records lets you place an item on reserve at a future time without having to create new Instructor, Course, and Title records.

**IMPORTANT**

Remember that you must do all reserve tasks in the reserve location. (For instructions on switching to a reserve location, see “Switching to a Reserve Location” on page 1-12.)

This chapter explains these topics:

- Setting Up Withdrawal Instructions
- Printing Instructor Letters
- Inactivating a Reserve Title
- Choosing a Withdrawal Cataloging Action
- Withdrawing an Item from Reserve
- Flagging Items for Withdrawal
- Using a Pull List Report
- Unarchiving an Item Record
- Deleting Reserve Records
Chapter 6: Withdrawing Items from Reserve

Setting Up Withdrawal Instructions

Withdrawal instructions tell a staff member what to do with an item once he or she withdraws it from reserve. (For example, the message may instruct a staff member to return the item to the instructor who owns it or place the item on a shelving cart and return it to the main stacks.)

Before a reserve staff member withdraws a reserve item, you can choose the withdrawal instructions that you want for each reserve item. If necessary, you may need to create or edit withdrawal instructions. (For example, you can create withdrawal instructions that tell a staff member to recycle, or throw away an item.)

To set up withdrawal instructions

1. Search for the course or instructor linked to the item that you want.
2. Click Titles.
   Horizon displays the Titles for Course or the Titles for Instructor window.
3. Do one of these options:
   - If Horizon displays the Titles for Instructor window, highlight the course that you want in the Courses field.
   - If Horizon displays the Titles for Course window, highlight the instructor whom you want in the Instructors field.
4. Highlight the title that you want from the list of titles.
5. Click Edit.
   Horizon displays the Edit Reserve Title window.
6. Click Items.
   Horizon displays a list of items for the title.
7. Highlight the item that you want.

NOTE
You may want to set up or choose the withdrawal instructions when you place an item on reserve. (For instructions, see “Editing the Item Record While Placing an Item on Reserve” on page 4-19 or “Placing an Item on Reserve” on page 5-7.)
8 Click Edit.

Horizon displays the Edit Item Edit for RBR window:

![Edit: Item Edit for RBR window]

9 Click Codes to the right of the Withdr Instr field.

Horizon displays the Code Lookup window:

![Code Lookup: RBR Withdrawal Instructions]

10 Do one of these options:
   - If you want to create new withdrawal instructions, click Add.
   - If you want to edit existing withdrawal instructions, click Edit.
Horizon displays the Edit RBR Withdrawal Instructions window:

11 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Enter the code that you want to represent the withdrawal instructions. (For example, enter “RO”.)</td>
</tr>
<tr>
<td>Instructions</td>
<td>Enter the withdrawal instructions. (For example, enter “Return item to owner”.)</td>
</tr>
</tbody>
</table>

12 Save your changes.
Printing Instructor Letters

You can send letters to instructors to inform them when you plan to withdraw their items from reserve. You can give the instructor any instructions or explanations in this letter. (For example, you can tell the instructor to come and retrieve the copy from the reserve location, or explain how to postpone the withdrawal date.) You can compose the instructor letter in the reserve Location record. (For instructions, see “Setting Up a Reserve Location Record” on page 2-3.)

NOTE

You must set up a withdrawal date for any title for which you plan to print an instructor letter. (For instructions, see “Creating a Reserve Title Record” on page 4-4 or “Creating a Reserve Title Record” on page 5-4.)

Also note that you cannot view the instructor letter before you print it.

Here is an example of an instructor letter:

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/19/02</td>
<td>Costigan Library Reserve</td>
<td>Page 1</td>
</tr>
</tbody>
</table>

Hamburg, Walter
Music Administration Building
1213 Main Street
Weed, California 97970

The following titles are scheduled to be removed from reserve at the end of this term. Please notify the library if any of these titles should remain in the reserve location. Thank you.

<table>
<thead>
<tr>
<th>Title</th>
<th>Course</th>
<th>Copies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capricorn concerto; Essay no. 1 for orchestra/</td>
<td>Music of the 20th Century</td>
<td>1</td>
</tr>
</tbody>
</table>
To print instructor letters

1 Start the **Withdrawal: Instructor Letter** process.

   The default location of this process is the **Reserve Bookroom\Reports** folder on the navigation bar.

   Horizon displays this dialog box:

   ![Dialog Box](image)

2 Do one of these options:

<table>
<thead>
<tr>
<th>Print instructor letters for items that you plan to withdraw on a specific date</th>
<th>Print instructor letters for items that you plan to withdraw over a range of dates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Enter the date in the <strong>Withdrawal Date</strong> field.</td>
<td><strong>1</strong> Click <strong>Date Range</strong>. Horizon displays the Date Range dialog box:</td>
</tr>
<tr>
<td><strong>2</strong> Click <strong>OK</strong>.</td>
<td><strong>2</strong> Mark one of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Prior to</strong>. Lets you print instructor letters for items that you plan to withdraw before a certain date.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Since</strong>. Lets you print instructor letters for items that you plan to withdraw after a certain date.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Range</strong>. Lets you print instructor letters for items that you plan to withdraw between certain dates.</td>
</tr>
<tr>
<td></td>
<td><strong>3</strong> Enter the appropriate withdrawal date or dates in the <strong>Date</strong> field.</td>
</tr>
<tr>
<td></td>
<td><strong>4</strong> Click <strong>OK</strong>.</td>
</tr>
</tbody>
</table>
3 If necessary, change your printer settings, and click OK.
Horizon prints the instructor letters according to the withdrawal dates you chose.

4 Click Close.

Inactivating a Reserve Title

Before or after you withdraw an item from Reserve Bookroom, you should inactivate the Title record; otherwise, users will be able to search for the title depending on the withdrawal cataloging action. When you change the status of the reserve Title record to “Inactive,” users can no longer search for the title in the reserve location.

NOTE
If you have already set a withdrawal date for an item (for example, you may have set a withdrawal date when you placed the item on reserve), Day End will automatically inactivate the reserve title after that date.
(For more information about Day End, see “About Maintenance and Day End” in the “Maintenance and Day End” chapter of the System Administration Guide.)

Inactivating a reserve title

1 Search for the course or instructor linked to the title that you want to inactivate.

2 Click Titles.
Horizon displays the Titles for Course or the Titles for Instructor window.

3 Do one of these options:
- If Horizon displays the Titles for Instructor window, highlight the course that you want in the Courses field.
- If Horizon displays the Titles for Course window, highlight the instructor whom you want in the Instructors field.

4 Highlight the title that you want from the list of titles.
Chapter 6: Withdrawing Items from Reserve

5 Click Edit.

Horizon displays the Edit Reserve Title window:

6 Mark Not Active.

7 Save your changes.

Choosing a Withdrawal Cataloging Action

You should also set up or change the withdrawal cataloging action to make sure that Horizon correctly processes the reserve Item and Title records when you withdraw an item. (For example, you may want to set up Horizon to archive both the Title and Item record, or you may choose to discard an Item record that you no longer use.)

NOTE

You may have set up withdrawal cataloging actions at the time you placed the item on reserve. (For instructions, see “Editing the Item Record While Placing an Item on Reserve” on page 4-19 or “Placing an Item on Reserve” on page 5-7.)

To choose a withdrawal cataloging action

1 Search for the instructor or course linked to the item that you plan to withdraw.
2 Highlight the course or instructor linked to the title that you want.
3 Highlight the title that you want.
4 Click Edit.

Horizon displays the Edit Reserve Title window.
5 Click Items.

Horizon lists all of the copies (items) for this title:

6 Highlight the item that you want to edit.

**IMPORTANT**

Make sure the item that you highlight is located in the reserve library; otherwise, you may inadvertently edit an item that belongs to another location.

7 Click Edit.

Horizon displays the Edit Item Edit for RBR window:
Chapter 6: Withdrawing Items from Reserve

8 Mark one of these options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>If you want to keep both the Title and Item records in Reserve Bookroom when you withdraw this item, mark this option.</td>
</tr>
<tr>
<td></td>
<td><strong>IMPORTANT</strong></td>
</tr>
<tr>
<td></td>
<td>You should mark this option for all library-owned items that you plan to return to another location, such as “main”.</td>
</tr>
<tr>
<td>Discard Item</td>
<td>If you want to delete the Item record from Reserve Bookroom and Horizon when you withdraw this item, mark this option.</td>
</tr>
<tr>
<td></td>
<td><strong>WARNING</strong></td>
</tr>
<tr>
<td></td>
<td>Do not mark this option for a library-owned item. This will delete the Item record from Horizon when you withdraw the item. (For more information, see “Withdrawing an Item from Reserve” on page 6-14.)</td>
</tr>
<tr>
<td>Discard Item and Bib</td>
<td>If you want to delete both the Item and Title records from Reserve Bookroom and Horizon when you withdraw this item, mark this option.</td>
</tr>
<tr>
<td></td>
<td><strong>WARNING</strong></td>
</tr>
<tr>
<td></td>
<td>Do not mark this option for a library-owned item. This will delete the Item or Title record from Horizon when you withdraw the item. (For more information, see “Withdrawing an Item from Reserve” on page 6-14.)</td>
</tr>
<tr>
<td>Archive Item</td>
<td>If you want to archive the Item record in Reserve Bookroom when you withdraw this item, mark this option.</td>
</tr>
<tr>
<td></td>
<td>You should choose this option for a non-library-owned item if you plan to place the item on reserve again at a future time. You can also use this option if you want to archive a non-library-owned item, but there are other Item records attached to the item’s Title record.</td>
</tr>
<tr>
<td></td>
<td><strong>WARNING</strong></td>
</tr>
<tr>
<td></td>
<td>Do not mark this option for a library-owned item if you plan to return the item to the owning location. Archiving an item removes the Item record from your library catalog and stores it in Reserve Bookroom. You can archive a library-owned item if you want to remove the item from searching and put it in storage. If you archive a library-owned item, you can restore the item in the main catalog by unarchiving the item. (For instructions, see “Unarchiving an Item Record” on page 6-18.)</td>
</tr>
</tbody>
</table>
Choosing a Withdrawal Cataloging Action

In this field                                      Do this

Archive Item and Bib                              If you want to archive both the Item and Title records in Reserve Bookroom when you withdraw this item, mark this option.

You should choose this option for a non-library-owned item if you plan to place the item on reserve again at a future time and there is only one Item record attached to the title.

You cannot use this option if more than one item is attached to the Bib record, regardless of the item’s location. (For example, there may be one copy in the reserve location and a second copy in the main location.) You must archive each Item record for the title before you can archive the Title record.

*WARNING*

Do not mark this option for a library-owned item if you plan to immediately return the item to the owning location. Archiving an Item and Bib removes both the Item and Title records from your library catalog and stores them in Reserve Bookroom.

You can archive a library-owned item if you want to remove the item from searching and put it in storage. If you archive a library-owned item, you can restore the item in the main catalog by unarchiving the item. (For instructions, see “Unarchiving an Item Record” on page 6-18.)

9 Save your changes.
Chapter 6: Withdrawing Items from Reserve

Withdrawning an Item from Reserve

When an item is scheduled to be removed from the reserve location, you can withdraw the item and return it to its original location. (For example, you can check a book back in to the main library, or return a book to an instructor.) If you plan to place the item on reserve again, you can choose to save, or archive, the Item record for future use. You can also choose to delete the Item record. (For instructions, see “Choosing a Withdrawal Cataloging Action” on page 6-10.)

When you withdraw a library-owned item from reserve, Horizon restores the owning location, ITYPE, collection, and call number that was saved on the Item record.

IMPORTANT

When you withdraw a library-owned item, make sure the saved location is the owning, or main location. If the Item record does not have a saved location, or if the saved location is the reserve location, Horizon will not return the record to the owning location when you withdraw the item.

To withdraw an item from reserve

1. Start the Withdraw Items from Reserve process.
   The default location of this process is the Reserve Bookroom/Reserve folder on the navigation bar.
   Horizon displays the Withdraw Items from Reserve window:

2. Do one of these options:
   - Enter the item’s barcode in the Barcode field, then click OK.
   - Scan the item’s barcode.
3 Click OK.

Horizon displays the Withdrawal Processing window:

![Withdrawal Processing window]

If you assigned an owner to the item, staff members can see the owner's name.

If you set up Horizon to print withdrawal labels, click **Print Label**. You must have set up a circulation slip printer in order to print withdrawal labels. (For instructions on setting up this option, see "Setting Workstation Receipt Options" in the *Circulation Setup Guide*.)

5 Click OK.

Horizon adds the item to the list of withdrawal items:

![Withdraw Items from Reserve window]

You can edit both the Item and Title record for this item.

6 If you did not discard the title from Reserve Bookroom and you need to edit the reserve title, click **Title Record**. (For example, you may have forgotten to inactivate the title before you withdrew the item. For instructions, see “Using a Pick List Report” on page 4-15.)

7 Repeat steps 2 through 6 for each item that you want to withdraw from reserve.
Flagging Items for Withdrawal

If an item is checked out when it is scheduled to go off reserve, you can flag the item for withdrawal from reserve. This places the item on a Pull list. A Pull list is a list of items in the reserve location that need to be returned to their owning location. (For more information, see “Using a Pull List Report” on page 6-18.) Once the items are checked in, Horizon alerts the Reserve Bookroom staff that the item is flagged for withdrawal. The staff member can then withdraw the item from reserve.

Before You Begin

Make sure you inactivate the Title record for the item you want to flag for withdrawal; otherwise, users will still be able to search for the item in Reserve Bookroom. (For instructions on changing the status, see “Inactivating a Reserve Title” on page 6-9.)

To flag items for withdrawal

1. Search for the course or instructor linked to the items that you want to withdraw.
2. Click Titles.
   Horizon displays the Titles for Course or the Titles for Instructor window.
3. Do one of these options:
   • If Horizon displays the Titles for Instructor window, highlight the course that you want in the Courses field.
   • If Horizon displays the Titles for Course window, highlight the instructor whom you want in the Instructors field.
4. Highlight the title that you want from the list of titles.
5. Click Edit.
   Horizon displays the Edit Reserve Title window.
6. Click Items.
   Horizon displays a list of items for the title:

   ![Items for Letteratura artistica dell'età dell'umanesimo: antologia di ...](image)

   This item is currently checked out from the reserve location.
Choose the items that you want to flag for withdrawal.

Click **Flag for Withdrawal**.

Horizon displays the Edit Saved Item Variables window:

![Edit: Saved Item Variables](image)

In the **Checkin note** field, enter the note that you want to display to reserve staff when the item is returned.

(For example, enter “Withdraw this item from reserve.”)

Save your changes.

When the item is returned, withdraw it from reserve.

(For instructions, see “Withdrawing an Item from Reserve” on page 6-14.)
Chapter 6: Withdrawing Items from Reserve

Using a Pull List Report

When you need to remove an item from reserve, you can flag the item for withdrawal. You can then generate a Pull List report of all items that are currently checked in and need to be withdrawn. If an item is checked out, you can flag the item for withdrawal. When the item is returned, Horizon adds the item to the Pull List. You can also use a Pull List report to withdraw the items from reserve once they are returned or removed from the shelves.

To use a Pull List report

1. Start the Withdrawal: Pull List process.
   The default location of this process is the Reserve Bookroom\Reports folder on the navigation bar.
   Horizon displays the List Reserve Bookroom Pull List.
2. If you want to print the list, choose File, Print.
3. If you want to withdraw an item on reserve, click Withdraw from Reserve.
   Horizon changes the item status and withdraws the item from reserve.

Unarchiving an Item Record

If you want to place an item on reserve again, but you archived the item when you withdrew it from Reserve Bookroom, you can unarchive the Item record and then place it on reserve. If you chose to also archive the bib record when you withdrew the item from reserve, Horizon automatically unarchives the Title record when you unarchive the Item record. Generally, you will only archive records for non-library-owned items. If you unarchive a library-owned item, Horizon returns the Item record to the owning location (for example, the main stacks). If you want to, you can then place the item on reserve again. (For instructions, see “Placing an Item on Reserve” on page 4-7.)

NOTE

If the owning location of the item is the reserve location, Horizon automatically places the item on reserve when you unarchive the Item record. Most archived Item records for non-library-owned items belong to the reserve location.

To unarchive an item record

1. Search for the course and instructor linked to the archived item that you want to place on reserve.
2. Click Titles.
Horizon displays the Titles for Course or the Titles for Instructor window:

3 Do one of these options:
   - If Horizon displays the Titles for Instructor window, highlight the course that you want in the Courses field.
   - If Horizon displays the Titles for Course window, highlight the instructor whom you want in the Instructors field.

4 Choose the title for the item that you want to unarchive.

5 Click Edit.

   Horizon displays the Edit Reserve Title window:

6 Click Item Archives.
Horizon displays a list of archived items:

7 Highlight one or more items that you want to unarchive.
8 Click *Unarchive*.

Horizon restores the Item record to the owning location:

9 If you want to, place the item on reserve.
(For instructions, see “Placing an Item on Reserve” on page 4-7.)
Deleting Reserve Records

Periodically, you may need to delete reserve records. (For example, you may want to delete the Instructor record for an instructor that is no longer on the faculty.) Because reserve records are linked, you must delete reserve records in a certain order. You can unlink reserve records without deleting them from Reserve Bookroom. (For example, before you can delete an Instructor record, you must unlink any titles that are linked to the instructor on the Instructor/Course/Title [ICT] record.)

IMPORTANT

You must withdraw an item from reserve before you delete the Item or Title record from Reserve Bookroom. If you delete a title or item from reserve before you withdraw the item, you may delete the Item or Title record from your system. If you choose to discard an Item or Bib record when you withdraw an item, Horizon automatically deletes these records from your system.

This section explains these topics:

- Unlinking a Reserve Title
- Deleting a Reserve Title Record
- Deleting an Instructor Record
- Deleting a Course Record

Unlinking a Reserve Title

You can unlink a title from any instructor or course without deleting the record from Reserve Bookroom. Because Title records are linked to both Instructor records and Course records, you must unlink all of the Title records attached to an instructor or course before you can delete the Instructor or Course record from Reserve Bookroom. You may also need to unlink a reserve title if you want to remove the title from one instructor or course, but you want to leave the title linked to another instructor or course. This lets you unlink a reserve title without deleting it from Reserve Bookroom.

Before You Begin

Before you unlink a title that is linked to only one course or instructor, make sure that you have withdrawn any items for the title. (For instructions, see “Withdrawing an Item from Reserve” on page 6-14.) Otherwise, Horizon will not be able to return the record of a library-owned item to the owning location, and you will delete both the Title and Item records from Reserve.
Chapter 6: Withdrawing Items from Reserve

To unlink a reserve title

1. Do one of these options:
   - If you want to unlink a title from an instructor, search for the Instructor record.
   - If you want to unlink a title from a course, search for the Course record.

Horizon displays the Titles for Instructor or Titles for Course window:

2. Highlight the title that you want to unlink from the course or instructor.

3. Click Edit.

   Horizon displays the Edit Reserve Title window:

This title is linked to more than one course or instructor.

You can view the name of the course group to which the title belongs.

You can view the name of the instructor to whom the title is linked.
4. In the drop-down list for the Course group, choose the instructor and course from which you want to unlink this title.

**IMPORTANT**

When the title is linked to only one course or instructor, make sure that you have withdrawn any items for the title before you unlink the title. (For instructions, see “Withdrawing an Item from Reserve” on page 6-14.)

5. Click Delete.

Horizon unlinks the title from the instructor and course that you chose:

```
This title is now linked to only one course and instructor.
```

6. Save your changes.

7. Repeat steps 4 through 6 for each instructor and course from which you want to unlink this title.

## Deleting a Reserve Title Record

If you no longer use a title in Reserve Bookroom, you can delete the Title record from Reserve Bookroom. If a title is linked to more than one course and instructor, you must unlink the title from each course and instructor before you can delete the title record.

**NOTE**

If you have withdrawn any library-owned items from Reserve Bookroom that are attached to a title, then deleting a reserve title does not delete the bibliographic information from your system.
To delete a reserve Title record

1. Search for a course or an instructor linked to the title that you want to delete.
   Horizon displays the Titles for Course or Titles for Instructor window.
2. Do one of these options:
   - If Horizon displays the Titles for Course window, choose an instructor from the list of instructors.
   - If Horizon displays the Titles for Instructor window, choose a course from the list of courses.
3. Highlight one or more titles from the list of titles.
4. Choose File, Delete Record.
5. Click OK.
   Horizon deletes the record from Reserve Bookroom.

Deleting an Instructor Record

If you need to remove an Instructor record from your reserve location, you can delete it after you unlink or delete any titles attached to the instructor. (For instructions, see “Unlinking a Reserve Title” on page 6-21 or “Deleting a Reserve Title Record” on page 6-23.)

To delete an Instructor record

1. Search for the instructor whom you want to delete.
2. If Horizon displays a list of reserve instructors, choose the one that you want.
3. Choose File, Delete Record.
   Horizon deletes the Instructor record from Reserve Bookroom.

Deleting a Course Record

If you need to remove a Course record from your reserve location, you can delete it after you unlink or delete any titles attached to the course. (For instructions, see “Unlinking a Reserve Title” on page 6-21 or “Deleting a Reserve Title Record” on page 6-23.)

To delete a Course record

1. Search for the course that you want to delete.
2. If Horizon displays a list of reserve courses, choose the one that you want.
3. Choose File, Delete Record.
   Horizon deletes the Course record from Reserve Bookroom.
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