

New Hire Training Guide – Appendix of Horizon Tasks

Supervisor: Like the Staff Training Guide, this appendix is a guide designed to help you cover all of the details associated with Staff who use Horizon on a regular basis. Depending on the staff member's role in our organization, s/he may need all or some of these competencies. As always, if you find this document needs modifications, please let the Staff Development Manager know.

I. Logging in

Setting up workspace in Horizon

Can perform the following actions to set up a workspace in Horizon:

- ☐ Log into Horizon with your branch's Username and Password.
 - ☐ Turn on and off the Navigation Window using the View menu option or the appropriate button in the Navigation Bar.
 - ☐ Toggle between the Checkout and Check In modes using the appropriate buttons in the Navigation Bar or the F8 shortcut key.
 - ☐ Enable the Workbook mode.
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II. Check in

Pre-check in item screening

Performs the following actions before checking in items:

- ☐ Examines print and multimedia items for damage and poor condition.
- ☐ Examines multimedia items for completeness.
- ☐ Weeds and discards at check in damaged items and items in poor physical condition, per the Weeding Guidelines.
- ☐ Follows the Incomplete A/V process when an A/V item is returned missing one or more pieces.

Check in with ACS Terminal

Can perform the following actions when checking in with ACS Terminal:

- ☐ Enable Standard Check In mode.
- ☐ Enable Backdate Check In mode for checking in items returned before the branch opens.
- ☐ Disable Single-Item Check In mode.
- ☐ Verify that the number of items placed on the RFID antenna match the number of items checked in on screen.
- ☐ Route items in transit to the correct branch.

Reading/writing tags with ACS Terminal

Can perform the following actions when reading/writing tags:

- ☐ Toggle ACS to Read Tags Only mode.
- ☐ Toggle ACS to Write Tags mode.
- ☐ Find an item's barcode number when the barcode sticker has been removed.
- ☐ Write a barcode number to a tag.

Check in with Horizon

Can perform the following actions when checking in with Horizon:

- ☐ Identify key components of the Check In screen, such as an item's title, call number, status, and transit destination.
- ☐ Enable standard Check In mode.
- ☐ Enable Book Drop Check In mode.
- ☐ Modify the check in date.
- ☐ Renew items from the Check In screen.
- ☐ Exempt overdue fees associated with an item.
- ☐ Enable the Show Borrower option.
- ☐ Enable the Show Blocks option, so that Horizon displays any blocks for every item checked in.

- ☐ Show blocks for a single item.
 - ☐ Print a receipt for returned items.
 - ☐ Clear the returned items display.
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III. Check Out

Checkout with Horizon

Can perform the following actions when checking out with Horizon:

- ☐ Locate a borrower by:
 - barcode
 - last name, first name
 - name keyword
 - street address
 - borrower number (for Unique accounts)
- ☐ Locate a previous borrower for whom you have searched.
- ☐ Check items out to a customer using a scanner, or by manually inputting an item's barcode number.
- ☐ Identify key components of the Check Out screen, such as:
 - an item's title, collection code, call number
 - due date, item type
 - item status, checkout date, checkout location, item barcode
 - total number of items checked out

Checkout with ACS

Can perform the following actions when checking out with ACS:

- ☐ Place a library card in the card reader.
- ☐ Scan a library card with one swipe.
- ☐ Troubleshoot the card reader.
- ☐ Verify that the antenna detects the correct number of items.
- ☐ Utilize the Add More Items and Continue buttons to check out a large number of items.
- ☐ Close out a session when a customer has finished using ACS.
- ☐ Toggle between ACS and Horizon.

IV. Customer Account Maintenance

Viewing and renewing items on the Check Out screen

Can perform the following actions when viewing/renewing items on customer's account:

- ☐ Display a list of all the items currently checked out to a customer.
- ☐ Renew a single item checked out to a customer.
- ☐ Renew all items checked out to a customer.
- ☐ Renew multiple items checked out to a customer that are not in consecutive order.
- ☐ Close out of a customer's record.

Can explain the following information to a customer:

- ☐ Total number of items a customer can have checked out at any given time.
- ☐ How to renew items online or via TeleCirc.
- ☐ Maximum number of times an item can be renewed.
- ☐ Situations when an item cannot be renewed.

Can explain the following information to a supervisor:

- ☐ Situations when a staff member may allow an additional renewal over the two renewal maximum.
- ☐ Situations when a staff member may manipulate the due date of an item.

Setting items to Claimed Return and/or Lost status

Can perform the following actions when handling misplaced and/or lost items:

- ☐ Change the status of an item from Checked Out to Claim Returned.
- ☐ Search the shelves for Claimed Returned item while customer waits.
- ☐ Change the status of an item from Checked Out to Lost.

Can explain the following information to a customer:

- ☐ How and why GCPL uses the Claimed Return status.
- ☐ The total amount of Claimed Return items that can be on a customer's account at a time before borrowing privileges are suspended.
- ☐ How GCPL assesses the Lost fee for an item.
- ☐ Why GCPL does not accept a retail item as replacement for an item that a customer has lost.
- ☐ The total number of Lost items that can be on a customer's account at a time before borrowing privileges are suspended.

Can explain the following information to a supervisor:

- ☐ Situations to set an item to Lost status instead of Claimed Return status.
- ☐ Implications of using Claimed Return with Interlibrary Loan items.
- ☐ Procedure for setting an Interlibrary Loan item to Lost status.

Assessing Fees to a customer's account

Can perform the following actions when adding Fees to a customer's account:

- ☐ Add miscellaneous Fees to an account.
- ☐ Add fees for an IncompleteAV Return – Second Notice.

Can explain the following information to a customer:

- ☐ How replacement costs for incomplete AV materials are assessed.

Can explain the following information to a supervisor:

- ☐ Where to find the Materials Replacement Costs chart on the staff intranet.
- ☐ Situations when to add miscellaneous Fees to an account.

Adding Notes to a customer's account

Can perform the following actions when adding Notes to a customer's account:

- ☐ Add an Address Correction Request block to an account.
- ☐ Add an Empty Case Return block to an account.
- ☐ Add an Email Address Correction Requested to an account.

- ☐ Add a Message to Borrower block to an account.
- ☐ Add a Comment – Staff View Only block to an account.
- ☐ Add a Never Send Notices block to an account.
- ☐ Add an Owes Out of County Fee block to an account.

Can explain the following information to a customer:

- ☐ The annual fee for an out of county membership.
- ☐ How GCPL determines the out of county fee.

Can explain the following information to a supervisor:

- ☐ Procedure for handling incomplete AV returns.
- ☐ Where to locate the Incomplete AV and Mixed Media Chart.
- ☐ Situations when a customer's account will receive an Exempt from Debt Collection block.
- ☐ The person(s) responsible for adding the Exempt from Debt Collection block to the customer's account (especially with regard to ILL).
- ☐ Situations when a customer's account will receive a Force to Debt Collection block.
- ☐ The person(s) responsible for adding the Force to Debt Collection block to the customer's account.
- ☐ Situations when a customer's account will receive a Customer Has a Payment Plan block.
- ☐ The person(s) responsible for adding the Customer Has a Payment Plan block to the customer's account.
- ☐ Who can see the Message to Borrower block in HIP and StaffPAC.
- ☐ Who can see the Comment – Staff Only View block in HIP and StaffPAC
- ☐ Situations when to add the Message to Borrower block.
- ☐ Situations when to add the Comment – Staff Only View.
- ☐ The maximum number of characters that can be displayed in one line of text in any type of Note block.

Reconciling Blocks in the Current Blocks Screen

Can perform the following actions when reconciling blocks:

- ☐ Manipulate the order in which blocks appear on the Current Blocks screen (by item, date, and related blocks).
- ☐ Apply full or partial payment to one or more blocks.
- ☐ Completely or partially waive fees for one or more blocks.
- ☐ Modify the amount due for a fee.
- ☐ Accept full payment for the \$10 Debt Collection block.
- ☐ View the details of a specific block.
- ☐ Add a comment to a specific block.
- ☐ Delete non-fee related blocks, such as Expired Hold and Message to Borrower.

Can explain the following information to a customer:

- ☐ The daily fee for overdue items.
- ☐ The maximum overdue fee for different types of items (books vs. magazines, etc).
- ☐ When a customer will lose borrowing privileges and the account will be submitted to Unique.
- ☐ GCPL's rationale for securing the services of the Unique Management collection agencies.
- ☐ The process of how a customer's account is submitted to Unique.
- ☐ The process of how Unique communicates with the customer and the library's role in the communication process.
- ☐ The details of a specific fee-related block.

Can explain the following information to a supervisor:

- ☐ The layout of the Current Blocks screen.
- ☐ The use of professional judgment when waiving or changing the amount due for overdue fees.
- ☐ When to accept payment for the \$10 Debt Collection block.

- ☐ The \$10 Debt Collection block must be paid in full.
- ☐ Lost items must be paid in full.

Working with the History Blocks Screen

Can perform the following actions inside the History Blocks screen:

- ☐ Sort History Blocks by date.
- ☐ Sort History Blocks by items.
- ☐ Sort History Blocks by block type.
- ☐ Toggle between the Current Blocks screen and the History Blocks screen.

Can explain the following information to a customer:

- ☐ Why GCPL does not retain a record of items a customer's has borrowed.
- ☐ The date a block was resolved.
- ☐ The branch where the block was resolved.
- ☐ The block associated with a specific item.

Can explain the following information to a supervisor:

- ☐ Why Horizon retains a history of blocks associated with a customer's account.

Working with the Payment History

Can perform the following actions inside the Payment History:

- ☐ Access a customer's payment history from a specified date.
- ☐ Navigate back and forth from the Payment History screen to the Current/History Block screens.
- ☐ Set the various display options for the Payment History screen.

Can explain the following information to a customer:

- ☐ The fee amount assessed to a particular item inside the payment history.
- ☐ The date a fee was assessed to a particular item inside the payment history.

- ☐ The location where a fee was assessed to a particular item inside the payment history.
- ☐ The total amount a customer paid for a fee(s).

Customer Requests

Can perform the following actions for customer requests:

- ☐ Place a request on an item while inside the customer's record.
- ☐ Place a request on an item while outside the customer's record.
- ☐ Locate the list of items that a customer has requested.
- ☐ Shuffle the request queue.
- ☐ Cancel a customer's request for an item.

Can explain the following information to a customer:

- ☐ Which items have been requested, an item's pickup location, status, and date the request will expire.

Can explain the following information to a supervisor:

- ☐ A situation when a staff member might shuffle the request queue.
- ☐ How wrongly shuffling the queue goes against GCPL's customer service philosophy and policy governing the illegal manipulation of GCPL databases.

V. Searching in Horizon

Finding items

Can perform the following actions for locating items in Horizon

- ☐ Find items in Horizon using the available search indexes.
- ☐ Find Interlibrary Loan items using a Title Browse.
- ☐ Find Interlibrary Loan items using the Item Group Editor.
- ☐ Enable Standard and Command Mode searching.
- ☐ Utilize Boolean operators in Command Mode to search across multiple indexes in Horizon.
- ☐ Access previous searches in Horizon.

- ☐ Utilize the Restrict function to:
 - search only for items that are checked in
 - search only for adult books on tape
 - search only for juvenile and easy materials
 - search only for items available at a specific branch
- ☐ Clear and reset the Restrict function.