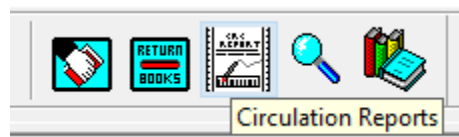


# Reports

This section explains how to generate and send the daily notices that remind borrowers about overdue, almost-due, or lost items, and how to run the reports that tell you which items need to be put on hold, sent elsewhere, or re-shelved. It also explains how to use the Item Report and Adhoc Stats features to help manage your collection.

## Circulation Reports

The Circulation Reports window is opened by clicking on its button:



The window opens separate from the rest of Horizon, so you can still access circulation functions while reports are being generated and output.

## Circulation Notices



### Printable Quick Guide: Circulation Notices

Circulation Notices must be run daily.

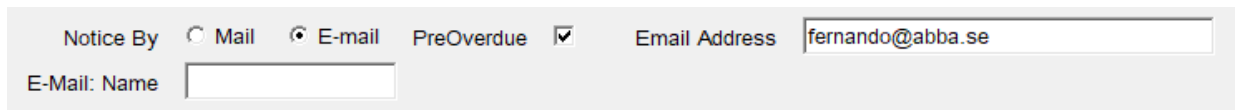
Running notices is a 2-step process: they have to be **generated and then outputted**. There are 2 batches to run, *Auto Notices* and *Pre-Overdue Notices*.

*Auto Notices* will send reminder emails to borrowers with overdue items, tell borrowers about items being held, and print letters for borrowers with lost items.

*Pre-Overdue Notices* will send reminder emails to borrowers 4 days before items are due back.

Emails about overdue and held items will only be sent to borrowers who have an email address record in their borrower record.

Pre-overdue reminder emails will only be sent to borrowers who also have the *PreOverdue* option selected in their record:



The form shows the following fields and options:

- Notice By: ☐ Mail ☒ E-mail
- PreOverdue: ☒
- Email Address:
- E-Mail: Name:

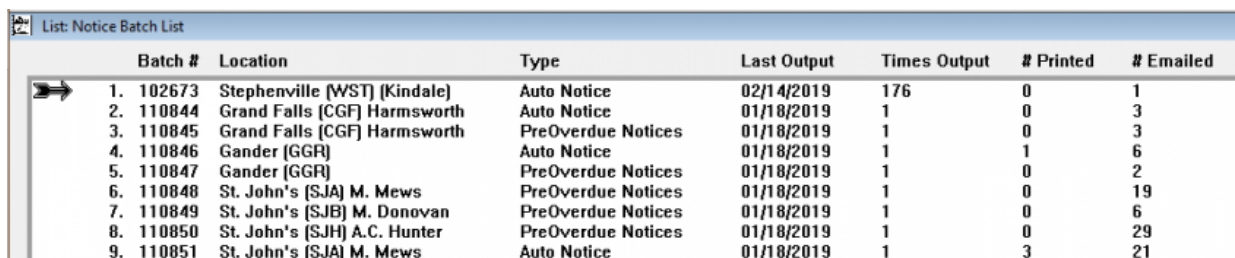
You can check this by going into the borrower's record from the checkout window:

- search for the borrower or scan their card
- press [F6]

To begin generating the notices:

- open Circulation Reports
- select from top menu **Notices > Notice Output**

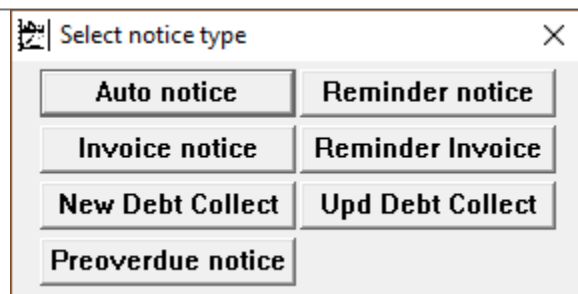
The Notice Batch List opens. It lists all the notices that have been recently generated across the province. The notices that you are about to generate will appear at the bottom of this list.



| Batch #   | Location                     | Type               | Last Output | Times Output | # Printed | # Emailed |
|-----------|------------------------------|--------------------|-------------|--------------|-----------|-----------|
| 1. 102673 | Stephenville [WST] (Kindale) | Auto Notice        | 02/14/2019  | 176          | 0         | 1         |
| 2. 110844 | Grand Falls [CGF] Harmsworth | Auto Notice        | 01/18/2019  | 1            | 0         | 3         |
| 3. 110845 | Grand Falls [CGF] Harmsworth | PreOverdue Notices | 01/18/2019  | 1            | 0         | 3         |
| 4. 110846 | Gander [GGR]                 | Auto Notice        | 01/18/2019  | 1            | 1         | 6         |
| 5. 110847 | Gander [GGR]                 | PreOverdue Notices | 01/18/2019  | 1            | 0         | 2         |
| 6. 110848 | St. John's [SJA] M. Mews     | PreOverdue Notices | 01/18/2019  | 1            | 0         | 19        |
| 7. 110849 | St. John's [SJB] M. Donovan  | PreOverdue Notices | 01/18/2019  | 1            | 0         | 6         |
| 8. 110850 | St. John's [SJH] A.C. Hunter | PreOverdue Notices | 01/18/2019  | 1            | 0         | 29        |
| 9. 110851 | St. John's [SJA] M. Mews     | Auto Notice        | 01/18/2019  | 1            | 3         | 21        |

To generate the Auto Notices:

- click on **New Batch**
- click on **Auto notice**
- select your location in the list
- click on **OK**



The dialog box titled "Select notice type" contains the following buttons:

- Auto notice
- Reminder notice
- Invoice notice
- Reminder Invoice
- New Debt Collect
- Upd Debt Collect
- Preoverdue notice

If there are no notices to generate then Horizon will tell you. That often happens at smaller sites.

Generate the Preoverdue Notices in a similar way:

- click on **New Batch**
- click on **Preoverdue notice**
- select your location in the list
- click on **OK**

When both sets of notices have been generated scroll to the bottom of the list. The quickest way is to press **[Ctrl] + [End]** on your keyboard.

Select the notices for your location, making sure that the last output date is blank:

|           | Batch # | Location               | Type               | Last Output |
|-----------|---------|------------------------|--------------------|-------------|
| 1044.     | 111914  | Gander (GGR)           | Auto Notice        | 02/15/2019  |
| 1045.     | 111915  | Gander (GGR)           | PreOverdue Notices | 02/15/2019  |
| 1046.     | 111916  | Port Aux Basques (WPB) | Auto Notice        | 02/15/2019  |
| 1047.     | 111917  | Port Aux Basques (WPB) | PreOverdue Notices | 02/15/2019  |
| 1048.     | 111918  | Bell Island (ABI)      | PreOverdue Notices | 02/15/2019  |
| 1049.     | 111919  | Holyrood (AHD)         | Auto Notice        | 02/15/2019  |
| 1050.     | 111920  | Holyrood (AHD)         | PreOverdue Notices | 02/15/2019  |
| ➡ 1051.   | 111921  | Deer Lake (WDL)        | Auto Notice        |             |
| 1052.     | 111922  | Deer Lake (WDL)        | PreOverdue Notices |             |
| Selection |         | 1051-1052              | Total: 1054        |             |

If the date is not blank it means that someone else has already output the notices for your site. **Don't output them again.**

Click on **Output** to email and print the notices. **If you don't do this then messages will not be sent.**

Emails will be automatically sent. If any emails cannot be sent then an error message will appear, and you will need to submit a support ticket to IT. See the section on [Troubleshooting](#).

If any letters have been printed for lost items, check the shelves for the items before mailing.

## If the Printer Jams and Notices are Lost

Notices can be reprinted:

- highlight the Auto Notices for today for your location
  - if you are coming back later to do this make sure to choose the correct date
- click on **Select**
- a list of borrowers who should have received notices appears
  - notices sent by email have a blue tick in the email column
- highlight the notices to be reprinted
- click on **Output** to print



The screenshot shows a window titled "Notices Selective Output". It contains a table with the following data:

|   | Batch No. | Location        | Borrower             | Amount | Balance | Output Date | Email |
|---|-----------|-----------------|----------------------|--------|---------|-------------|-------|
| ➡ | 1. 111936 | Carbonear [ACR] | Appell, Melville Rob | 0.00   | 0.00    | 02/15/19    |       |
|   | 2. 111936 | Carbonear [ACR] | Squibb, Carol Anne   | 0.00   | 0.00    | 02/15/19    | ✓     |

Below the table, there is a "Selection" field, a "Total: 2" label, and five buttons: "Output", "Select All", "Sort...", "Display...", and "Force Print".

## Request Pull List



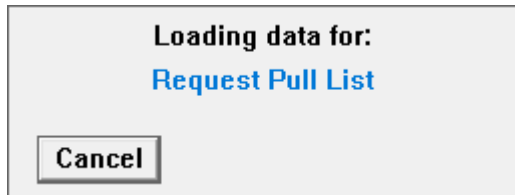
### Printable Quick Guide: Requests and Holds

The Pull List is the list of all items that need to be fetched from the shelves and put on hold for borrowers or sent to other locations. Scan the items into the checkin and Horizon will tell you what to do.

The pull list must be requested daily, and at smaller sites it may often be empty.

To request the pull list:

- open Circulation Reports
- select from top menu **Requests > Request Pull List**
  - this message will appear:



It can take some time before the list is generated, but while that's happening you can go back into Horizon and use other circulation functions if need be.

You will need to print the list and go find the items on the shelves. However when first generated it provides too much information about each item to print tidily:

The screenshot shows a window titled "List: Request Pull List (Using Pull List Priority)". Inside is a table with the following columns: Coll/Item Status, Copy, Call No., Barcode/Author, Pickup, Title, and Specific. The table contains 7 rows of data, each representing a request for a specific item. Below the table, there is a "Selection" dropdown menu, a "Total: 30" label, and several buttons: "List Pulled", "Keep List", "Keep Item", "Delete Request(s)", "Sort...", and "Display...".

| Coll/Item Status               | Copy | Call No.   | Barcode/Author                   | Pickup | Title                                     | Specific |
|--------------------------------|------|------------|----------------------------------|--------|---|----------|
| 1. Adult NFic<br>Checked In    | 2017 | 916.8 AF8  | 33296031116168                   | sjh    | Africa.                                   | bib      |
| 2. Adult NFic<br>Checked In    |      | 741.24 B64 | Borgeson, Bet.<br>33296006750827 | sja    | Colored pencil for the serious beginner / | bib      |
| 3. Adult Fic DVD<br>Checked In |      | FIC BOO    | 33296030869320                   | sjb    | Boogie nights ; [videorecording (DVD)]    | 54. bib  |
| 4. Adult Fic DVD<br>Checked In |      | FIC MUR    | 33296031557312                   | sjh    | Murder on the Orient Express.             | bib      |
| 5. Adult Fic DVD<br>Checked In |      | FIC EXP    | 33296026998281                   | sjb    | The experiment. [videorecording (DVD)]    | bib      |
| 6. Adult Fic DVD<br>Checked In |      | FIC DEV    | 33296018948468                   | sjb    | Devil. [videorecording (DVD)]             | bib      |
| 7. Adult Fic DVD<br>Checked In |      | FIC KIL    | 33296031557577                   | sjb    | The killing of a sacred deer.             | bib      |

So click on **Display** and choose these four columns:

- *Coll*
- *Call no.*
- *Author*
- *Title*

If your site holds multiple copies of items then you will need to select *Barcode* too.

Display Options

Choose columns to display

- Coll
- Call No.
- Author
- Title
- Copy
- Barcode
- Item Status
- Name
- Specific
- Pickup

Display properties

Coll

Position 1

Width 26 characters

Label Coll

☐ Right justify

Code ☐ code ☒ description

Value ☐ short ☐ long

OK Cancel

Click on **OK** and the list will look a lot tidier, and can now be printed with one item per line:

List: Request Pull List (Using Pull List Priority)

| Coll                           | Call No.        | Author                  | Title  |
|--------------------------------|-----------------|-------------------------|--|
| 1. Adult NFic                  | 916.8 AF8       |                         | Africa.                                      |
| 2. Adult NFic                  | 741.24 B64      | Borgeson, Bet.          | Colored pencil for the serious beginner /    |
| 3. Adult Fic DVD               | FIC MUR         |                         | Murder on the Orient Express.                |
| 4. Adult NFic                  | 616.342 B81     | Browne, Jennifer        | Happy, healthy gut : the natural diet        |
| 5. JUV PICTURE BK - EASY       | X LOB           | Lobel, Arnold.          | Frog and Toad all year /                     |
| 6. Sun Life Financial Musical  | KEYBOARD        |                         | Digital keyboard : 61-note. [instrument]     |
| 7. Sun Life Financial Musical  | KEYBOARD        |                         | Digital keyboard : 61-note. [instrument]     |
| 8. Sun Life Financial Musical  | GUITAR STEEL    |                         | Acoustic guitar : full size, steel 6-string. |
| 9. Adult NFic NL               | 641.5 R54       | Roberts, Sheilah, 1954- | For maids who brew & bake : rare &           |
| 10. Sun Life Financial Musical | PIANO 88NOTE    |                         | Digital piano : 88-note. [instrument]        |
| 11. Sun Life Financial Musical | PIANO 88NOTE    |                         | Digital piano : 88-note. [instrument]        |
| 12. Sun Life Financial Musical | VIOLIN 1/4      |                         | Violin : 1/4 size. [instrument]              |
| 13. Sun Life Financial Musical | ELECTRIC GUITAR |                         | Electric guitar : full size, steel 6-string. |
| 14. Sun Life Financial Musical | VIOLIN 4/4      |                         | Violin : 4/4 size. [instrument]              |

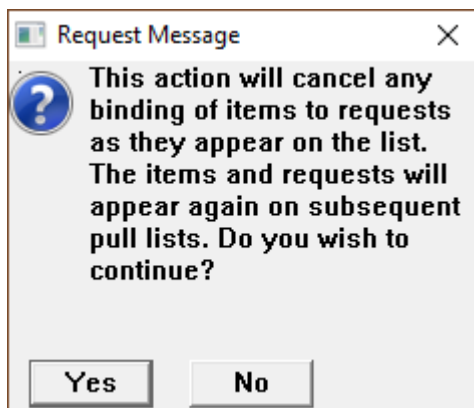
Selection

Total: 19

List Pulled Keep List Keep Item Delete Request(s) Sort... Display...

When you have printed the list click on **Keep List**. This will make sure that items keep appearing in the list until you have found them and checked them in.

Click on **Yes** when this pop-up appears:



**Never click on List Pulled.** This will delete everything from the list for the next 24 hours.

**Never click on Delete Request(s).** This will cancel all the requests made by borrowers. If you need to delete a request for a borrower, do that from the Borrower's Request List. See the section [Requests and Holds](#).

When you have found the items check them in. Horizon will tell you who to place each item on hold for.

If you cannot find an item in the list, then after a few days you will need to change its status to *trace*. See the section [Adding and Editing items](#).

---

## Expired and Cancelled Holds

The Expired and Cancelled Holds Report provides a list of items being held that the borrowers have not picked up on time. The items need to be removed from the holds shelf and checked in. Horizon will then tell you if the item needs to be held for another borrower, placed in transit, or re-shelved.

This report must be generated daily, and at smaller sites it may often be empty.

To generate the report:

- open Circulation Reports
- select from top menu **Requests > Expired/Canceled**

| List: Expired or Canceled Holds |  |                |              |           |             |
|---------------------------------|--|----------------|--------------|-----------|-------------|
|                                 | Title/Location   | Item Barcode   | Status       | Date Held | Expire Date |
| ➡                               | 1. Chase.<br>sjh   | 33296031081289 | Hold Expired | 02/11/19  | 02/18/19    |
|                                 | 2. Father Brown. Season six. [videorecording (DVD)]<br>sjh | 33296031899508 | Hold Expired | 02/11/19  | 02/18/19    |
|                                 | 3. Light in August : the corrected text.<br>sjh            | 33296014268259 | Hold Expired | 02/09/19  | 02/16/19    |
|                                 | 4. Mary Poppins. [videorecording (DVD)]<br>sjh             | 33296028001001 | Hold Expired | 02/11/19  | 02/18/19    |
|                                 | 5. Fear : Trump in the White House /<br>sjh                | 33296031821858 | Hold Expired | 01/30/19  | 02/06/19    |

Selection  Total: 10

Remove the items from the holds shelf and check them in. If an item cannot be found on the holds shelf then check the regular shelving. If an item is not there either then you will need to set its status to *trace* using the Item Status Editor. See the section [Adding and Editing items](#).

## I didn't have time to run my notices today!

Generate and output them as soon as you can. Horizon will generate all notices that should have been sent since you last ran notices.

Be aware that running notices late gives borrowers less notice about items that are almost due back and items that are being held for them.

## Online Stats

Every day you need to submit circulation and activity statistics for your site.

This is done through the [Library Stats System](#). Some of the stats are automatically completed by Horizon, and they appear in gray. Some stats have to be completed manually, and they appear in blue or yellow:



Stats for: March 1, 2019

|                   |                   |                      |                       |                        |                   |                  |                       |                      |                   |
|-------------------|-------------------|----------------------|-----------------------|------------------------|-------------------|------------------|-----------------------|----------------------|-------------------|
| ADULT FICTION     | ADULT NON-FICTION | ADULT UN-CATALOGUED  | ADULT MAGAZINES       | ADULT SOUND REC        | ADULT DVD/VIDEO   | JUV FICTION      | JUV NON-FICTION       | JUV X-BOOKS          | JUV UN-CATALOGUED |
| 0                 | 0                 | 0                    | 0                     | 0                      | 0                 | 0                | 0                     | 0                    | 0                 |
| ILL LOANED        | ILL BORROWED      | ILL UNSUCCESS.       | REF QUESTION - SIMPLE | REF QUESTION - COMPLEX | CELA              |                  |                       |                      |                   |
| 0                 | 0                 | 0                    | 0                     | 0                      | 0                 |                  |                       |                      |                   |
| # TLC PROGRAMS    | ATTENDANCE        | # OTHER JUV PROGRAMS | ATTENDANCE            | JUV GROUP VISITS       | ATTENDANCE        | # ADULT PROGRAMS | ATTENDANCE            | # ADULT GROUP VISITS | ATTENDANCE        |
| 0                 | 0                 | 0                    | 0                     | 0                      | 0                 | 0                | 0                     | 0                    | 0                 |
| COMPUTER SESSIONS | OPEN HOURS        | STAFF HOURS          | ADULT MULTI-LINGUAL   | TALKING BOOKS          | EDUCATIONAL MEDIA | MICRO FILM       | NEWSPAPER & MAGAZINES | BOOKS                | VERTICAL FILE     |
| 0.0               | 0.00              | 0.00                 | 0                     | 0                      | 0                 | 0                | 0                     | 0                    | 0                 |

## Item Report

Item Report is useful for managing your collections. You ask it to search for items in a particular collection, status, and location and it will return a list of results.

As examples, it can provide lists of all items that:

- are currently checked out
- have not been checked out in the last 4 years (or any other time period)
- are in the Adult Fiction NL collection
- need to be traced
- are on order for your location

You can *compound* the search, meaning that you can ask it to search based on 2 or more conditions.

For example, a search for *'items that need to be traced from the DVD location at Bay Roberts'* will use 3 conditions:

status is 'trace'

AND


item type is 'dvd'

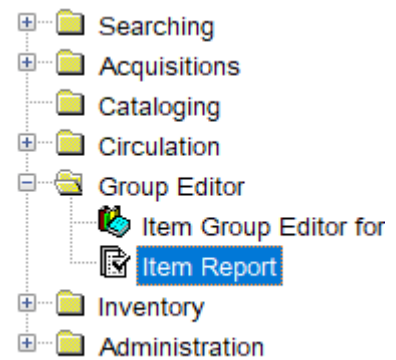
AND

location is 'abr'

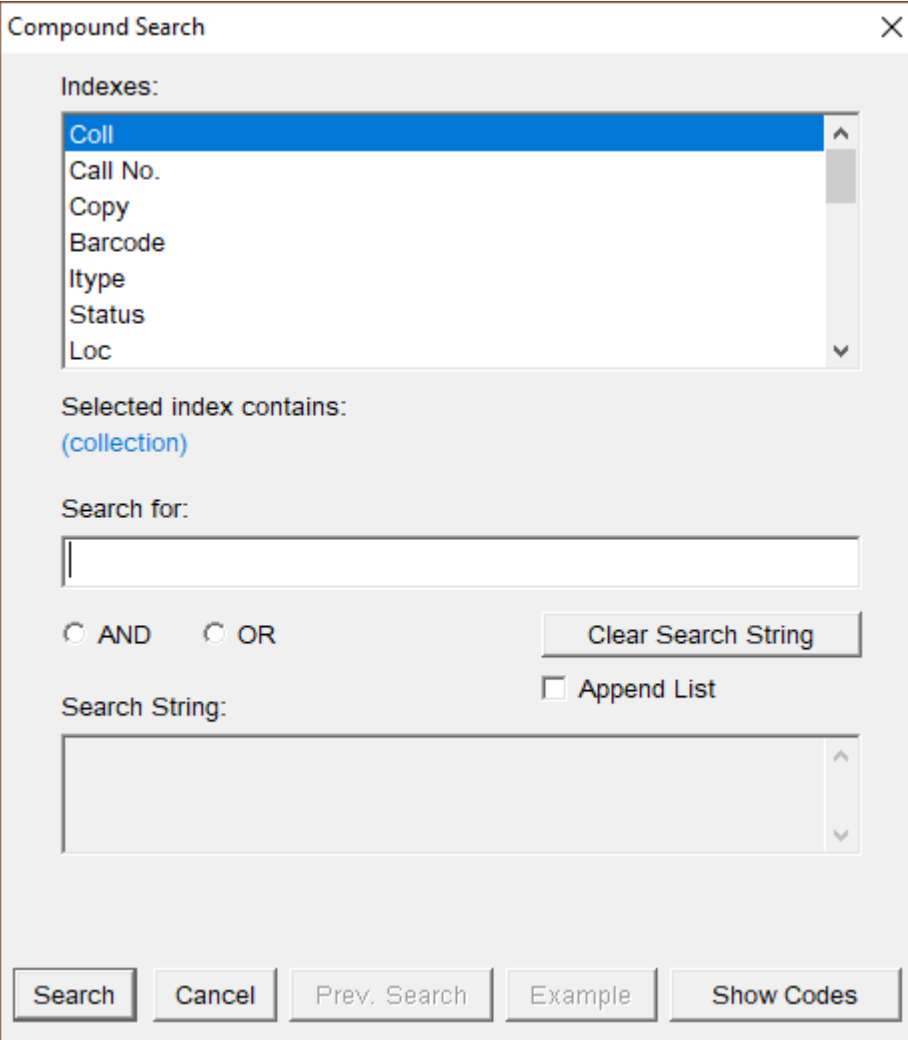
See [Compound Search](#) for how to do this.

You can print the list of results, and you can also sort the list by collection and call number, which will help when you are searching the shelves for items.

Item Report is opened by clicking on , or it can be found in the navigation bar:



Double-click on it to open the compound search box:

A screenshot of a 'Compound Search' dialog box. At the top, the title bar says 'Compound Search' with a close button (X) on the right. Below the title bar, there's a section labeled 'Indexes:' containing a list box with the following items: 'Coll' (highlighted in blue), 'Call No.', 'Copy', 'Barcode', 'Itype', 'Status', and 'Loc'. Below the list box, it says 'Selected index contains: (collection)'. Then, there's a 'Search for:' label followed by a text input field. Below the input field, there are two radio buttons: 'AND' and 'OR'. To the right of these is a button labeled 'Clear Search String'. Below the radio buttons is a checkbox labeled 'Append List'. Below the checkbox is a 'Search String:' label followed by a larger text input field. At the bottom of the dialog, there are five buttons: 'Search', 'Cancel', 'Prev. Search', 'Example', and 'Show Codes'.

Select an index in the top half of the box and then type in the code for it in the '*Search for*' field. Click on **Search** to see the list of results.

If you don't know what code to use then click on **Show Codes**:

Code Lookup: Collection Codes

| Collection | Descr.                              |
|------------|-------------------------------------|
| af         | Adult Fic                           |
| afa        | Adult Fic Audio Bk                  |
| afaex      | Adult Fic Audio Bk Exch             |
| afao       | Adult Fic Audio Bk Oversize         |
| afb        | ADULT FIC - BASEMENT                |
| afbd       | Adult Fic Blu-ray Disc              |
| afbdex     | Adult Fic Blu-Ray DVD Exch          |
| afbdm      | Adult Fic Blu-ray Disc Multilingual |

Collection  Total: 464

OK Cancel Add Edit

## Simple example: find all items belonging to a location

To find all items belonging to Trepassey (ATY):

- select the index 'Loc'
- in the *Search for* field, enter the code 'aty'

These are the results:

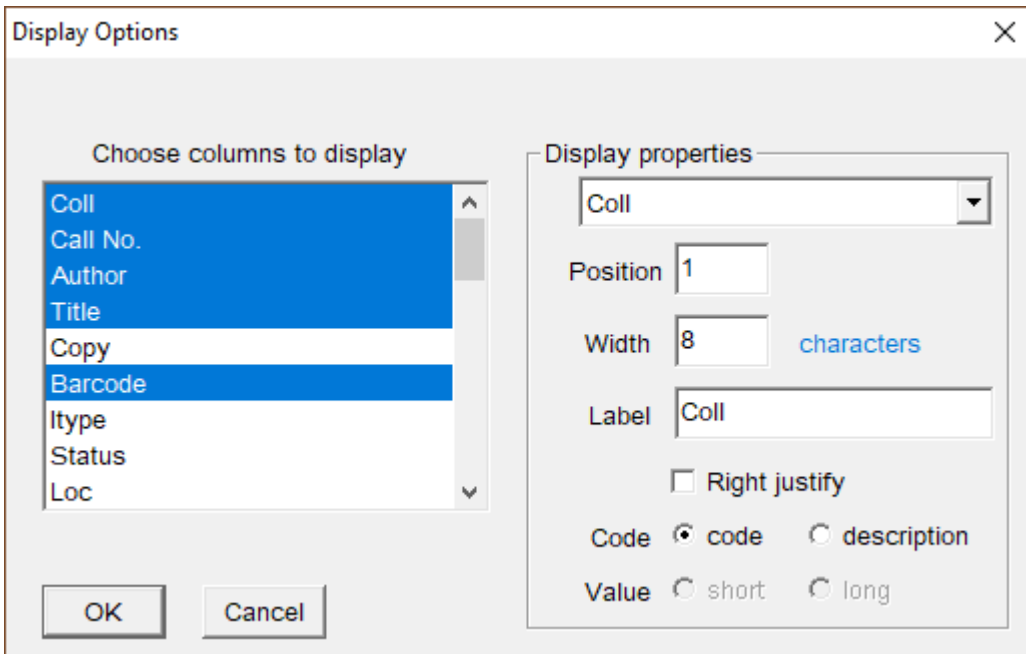
|    | Coll/Barcode   | Call No.    | Itype | Author/Status  | Title  | Loc | Copy |
|----|----------------|-------------|-------|----------------|--|-----|------|
| 1. | jx             | X ONE       |       |                | 1-2-3 I can count /                            |     |      |
|    | -31088         |             | jb    | pr             |  | aty |      |
| 2. | jx             | X HUT       |       | Hutchins, Pat, | 1 hunter /                                     |     |      |
|    | -73414         |             | jb    | pr             |  | aty |      |
| 3. | nf             | 909.82 ON2  |       |                | 100 events that shook our world : a history in |     |      |
|    | 33296012581968 |             | b     | pr             |  | aty |      |
| 4. | jnf            | 155.2 GER   |       | Gerry, Lisa.   | 100 things to make you happy /                 |     |      |
|    | 33296029787632 |             | jb    | pr             |  | aty |      |
| 5. | jnf            | 796.962 DUP |       | Duplacey,      | 1000 point players /                           |     |      |
|    | -495687        |             | jb    | pr             |  | aty |      |
| 6. | nf             | 745.5 ON2   |       |                | 101 crafts under \$10 : easy-to-make ideas for |     |      |
|    | 33296010982424 |             | b     | pr             |  | aty |      |

Selection  10,21 Total: 7029

Edit New Sort... Display...

Clicking on **Display** lets you choose which information to display for each item, which is useful if you need to print the list.

Keep the columns highlighted that you want to display:



The 'Display Options' dialog box is shown. On the left, under 'Choose columns to display', a list of columns is shown with 'Coll', 'Call No.', 'Author', 'Title', 'Barcode', 'Itype', 'Status', and 'Loc'. The first five columns are highlighted in blue. On the right, under 'Display properties', the 'Coll' column is selected in a dropdown. Below this, 'Position' is set to 1, 'Width' is 8 characters, and 'Label' is 'Coll'. There is an unchecked checkbox for 'Right justify'. At the bottom, 'Code' is set to 'code' (radio button) and 'Value' is set to 'short' (radio button).

Display Options

Choose columns to display

Coll  
Call No.  
Author  
Title  
Copy  
Barcode  
Itype  
Status  
Loc

OK Cancel

Display properties

Coll

Position 1

Width 8 characters

Label Coll

☐ Right justify

Code ☒ code ☐ description

Value ☐ short ☐ long

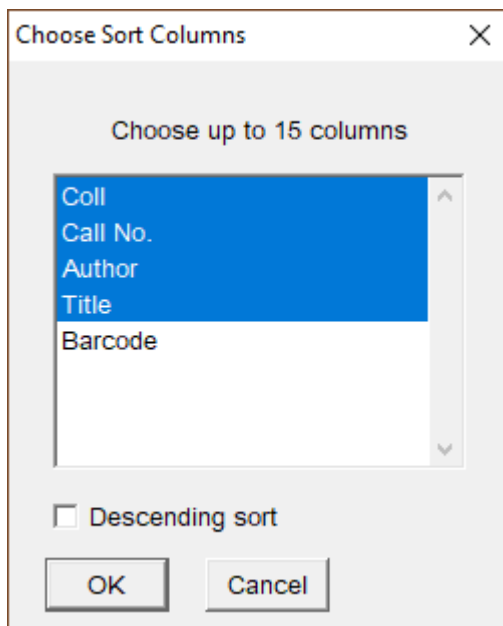
The list is now clearer to read:



A screenshot of a table view showing a list of items. The table has five columns: Coll, Call No., Author, Title, and Barcode. The first two columns are highlighted in blue. The list contains 12 items, numbered 1 to 12. A mouse cursor is pointing at the first item.

|   | Coll   | Call No.    | Author          | Title  | Barcode        |
|---|--------|-------------|-----------------|--|----------------|
| ➡ | 1. jx  | X ONE       |                 | 1-2-3 I can count /                            | -31088         |
|   | 2. jx  | X HUT       | Hutchins, Pat,  | 1 hunter /                                     | -73414         |
|   | 3. nf  | 909.82 ON2  |                 | 100 events that shook our world : a history in | 33296012581968 |
|   | 4. jnf | 155.2 GER   | Gerry, Lisa.    | 100 things to make you happy /                 | 33296029787632 |
|   | 5. jnf | 796.962 DUP | Duplacey,       | 1000 point players /                           | -495687        |
|   | 6. nf  | 745.5 ON2   |                 | 101 crafts under \$10 : easy-to-make ideas for | 33296010982424 |
|   | 7. jnf | 520 GAL     | Gallant, Roy A. | 101 questions and answers about the universe / | -196423        |
|   | 8. jnf | 004.67 WAL  | Wallace, Mark.  | 101 things to do on the Internet /             | 33296007211456 |
|   | 9. nf  | 629.223 T68 | Traister, John  | 101 vantastic ideas to improve your van /      | -10873         |
|   | 10. nf | 745.5 ON2   |                 | 101 ways to stitch/craft create : quick & easy | 33296020733049 |
|   | 11. nf | 973.931 D97 | Dwyer, Jim,     | 102 minutes : the untold story of the fight to | 33296012699133 |
|   | 12. af | FIC PAT     | Patterson,      | 10th anniversary.                              | 33296019826127 |

It can also help to sort the list, by collection and into alphabetical order. Click on **Display** and choose what to order by:



...and the list is now sorted, and good to print:

|   | Coll   | Call No. | Author           | Title                                       |
|---|--------|----------|------------------|---|
| ➡ | 1. af  |          | Scharer,         | Age of Light : A Novel.                     |
|   | 2. af  |          | Wiggs, Susan.    | Between you & me.                           |
|   | 3. af  | FIC ABB  | Abbott, Jeff.    | Downfall.                                   |
|   | 4. af  | FIC ABB  | Abbott, John.    | Scimitar.                                   |
|   | 5. af  | FIC ABB  | Abbott, John.    | Scimitar.                                   |
|   | 6. af  | FIC ADL  | Adler, Elizabeth | The rich shall inherit /                    |
|   | 7. af  | FIC ADL  | Adler-Olsen,     | The keeper of lost causes.                  |
|   | 8. af  | FIC ALE  | Alexander,       | Dangerous to know.                          |
|   | 9. af  | FIC ALF  |                  | Alfred Hitchcock's tales to make your teeth |
|   | 10. af | FIC ALL  | Allen, Charlotte | Leftover dreams /                           |
|   | 11. af | FIC ALL  | Allen, Sarah     | The girl who chased the moon : a novel.     |
|   | 12. af | FIC AND  | Andrews, Mary    | Blue Christmas.                             |

## Compound Search

To search using more than one condition you need to:

- select the **first index to search**
- enter the **first condition**
- select **AND** or **OR**
- select the **second index to search**
- enter the **second condition**, and so on

## Compound Example: find items on order for your location

- select the index *Status*

- enter '*r*' into the *Search for* field

- select **AND**

- select the index *Loc*

- enter the 3 letter code for your location (for example '*amp*' for Mount Pearl)

- click on **Search**

Ittype  
Status  
Loc

Selected index contains:  
(item\_status)

Search for:  
r



Ittype  
Status  
Loc

Selected index contains:  
(location)

Search for:  
amp

...and here are the results:

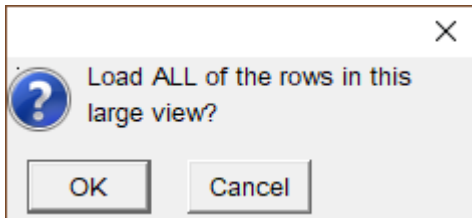
| Coll    | Author           | Title  | Barcode    |
|---------|------------------|--|------------|
| 1. afsc | Thorne, Sally    | 99 Percent Mine : A Novel.                       | acq2301770 |
| 2. afsc | Tudor, C. J.     | Hiding Place.                                    | acq2301912 |
| 3. af   | Michaelides,     | Silent Patient.                                  | acq2302050 |
| 4. jnf  | Milligan, Dustin | Little Courthouse on the Prairie : The Right to  | acq2302550 |
| 5. jxbd | Bravi, Soledad   | Noisy Book.                                      | acq2302642 |
| 6. jnf  | Edsel, Robert    | Greatest Treasure Hunt in History : The Story of | acq2302880 |
| 7. jnf  | Dorling          | Calm: Mindfulness for Kids.                      | acq2302930 |
| 8. jnf  | Dorling          | Smithsonian.                                     | acq2303071 |
| 9. jf   | Florence,        | He who dreams.                                   | acq2306416 |

## Compound Example: listing items needing to be traced at your location

- select the index *Status*
  - enter 'trace' into the *Search for* field
  - select **AND**
  - select the index *Loc*
  - enter the 3 letter code for your location (for example '*amp*' for Mount Pearl)
  - click on **Search**
- 

## Cancelling a Search

If you decide to cancel a search this pop-up message will appear:



Click on **Cancel**, otherwise Horizon will try to fetch the entire database of items.

Press **[Esc]** to close the Item Report window.

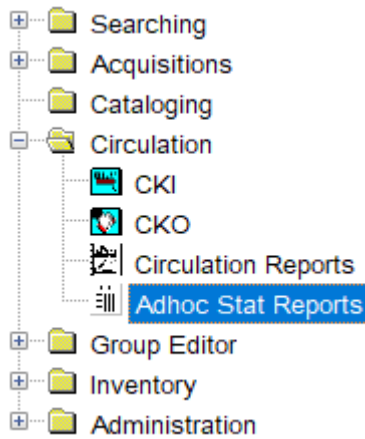
---

## Adhoc Stat Reports

Horizon can generate detailed reports, such as a breakdown of how many items are in each collection at a site, or how much revenue was taken in lost and late fees over a chosen period.

These reports are generated by the Adhoc Stats Report feature found in the navigation bar:





Double-click on Adhoc Stats Reports to open the generator box. Select:

- the *type* of report
- one or more *locations* to generate it for
- if you have chosen a daily report then also enter a date in the *Date* field

If you are not working at Bell Island then deselect that location before selecting your site

**AdHoc Statistical Report Generator (Horizon:horizon)**

Choose a Report Type and one or more Locations

| Report Type                                 | Locations                      |
|---|--------------------------------|
| Monthly Report - Circulation Details        | abi - Bell Island (ABI)        |
| Monthly Report - Cash Management            | <b>abr - Bay Roberts (ABR)</b> |
| Monthly Activity Report - By Day-of-week    | abs - Brigus (ABS)             |
| Monthly Activity Report - By Hour           | acr - Carbonear (ACR)          |
| Monthly Report - Overview                   | acs - Conc Bay South (ACS)     |
| <b>Monthly Report - Collection Snapshot</b> | aex - Don't use                |
| Monthly Report - Call Number Collection S   | afh - Fox Harbour (AFH)        |

Date: 02/15/2019

Print Cancel Save to File About

In the example above the monthly Collection Snapshot report is going to be generated for Bay Roberts (ABR).

Click on **Save to File** if you want to keep the report.

To open the saved file use *Wordpad* or *Notepad* because both programs retain the column formatting.

A monthly collection snapshot looks like this:

Monthly Report - Collection Snapshot for Feb 2019

Locations on this report: Bay Roberts (ABR)

Items: Coll. IStat

| Description       | Feb 2019 | Jan 2019 | %chg | Feb 2018 | %chg | 2019 AVE | 2018 AVE | %chg |
|-------------------|----------|----------|------|----------|------|----------|----------|------|
| AF - Adult Fic    | 6779     | 6783     | -1   | 6372     | 6    | 6781     | 1060     | 539  |
| ASR - Adult Fic A | 90       | 90       | 0    | 90       | 0    | 90       | 15       | 500  |
| ASR - Adult Fic A | 0        | 0        | 0    | 0        | 0    | 0        | 0        | 0    |
| AF - Adult Fic -  | 6        | 6        | 0    | 4        | 50   | 6        | 0        | 100  |
| AVR - Adult Fic B | 9        | 7        | 28   | 6        | 50   | 8        | 1        | 700  |
| AVR - Adult Fic B | 0        | 0        | 0    | 0        | 0    | 0        | 0        | 0    |
| AVR - Adult Fic B | 0        | 0        | 0    | 0        | 0    | 0        | 0        | 0    |
| AVR - Adult Fic D | 1692     | 1639     | 3    | 1445     | 17   | 1665     | 240      | 593  |
| AVR - Adult Fic D | 27       | 28       | -4   | 32       | -16  | 27       | 5        | 440  |
| AVR - Adult Fic D | 0        | 0        | 0    | 0        | 0    | 0        | 0        | 0    |
| AVR - Adult Fic D | 6        | 6        | 0    | 0        | 100  | 6        | 0        | 100  |

The report can run to several pages and provides a comprehensive breakdown of how many items are in each collection, as well as how many items were in the collections 1 month ago and 1 year ago.

The descriptions are truncated, so some can be slightly cryptic – for example in ‘Adult Fiction A’, the ‘A’ is for ‘Audio’. Similarly ‘B’ is for ‘Blu-Ray’, ‘D’ is for ‘DVD’ and so on.

Also, be aware that the report lists how many items per collection Horizon has recorded for your site.

This can differ from reality if weeded books were not discarded in Horizon, or if books have gone missing without staff being aware.

The Item Report feature can be used to list exactly which items Horizon has recorded for the collections at your location.

Revision #29

Created Mon, Mar 11, 2019 6:19 PM by [Tammy](#)

Updated Mon, Oct 28, 2024 4:43 PM by [Kyrán Dennison](#)