Horizon 7.5.4

Cataloging User Guide

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Contents

About this guide

Welcome to Horizon Cataloging. Cataloging lets you present identifying information about your collection in an electronic database that borrowers can search quickly. It also lets you organize your collection better by allowing you to store certain types of information (such as author names, series, and subjects) in authority records, which keeps the information uniform. Cataloging lets you import and export existing records, edit them, and create and edit new records. It lets you work with records in both MARC and non-MARC format. If you run Windows NT, 2000, or XP, your computer can handle Unicode characters, and Cataloging lets you display and edit MARC records in Unicode.

This *Cataloging Guide* is for library cataloging staff. It explains how to use Cataloging to perform cataloging tasks. It is organized into chapters that focus on the type of records that you work with.

For more information about this guide, see these topics:

Cataloging User Guide Contents

This guide contains these major sections:

- Chapter: Chapter 1, "Getting Started" on page 1 explains the basic information that you need to begin using Cataloging and gives you an overview of this guide.
- Chapter: Chapter 2, "Customizing the MARC Editor" on page 12 explains how to set up the display parameters for the MARC Editor.
- Chapter: Chapter 3, "MARC Editing" on page 40 provides an overview of MARC records and includes information on how to add, edit, navigate through, and print records, as well as how you can check errors and undo mistakes. It also discusses Unicode and explains how to enter special characters.

- Chapter: Chapter 4, "Bibliographic Records" on page 81 explains how to work with new and existing bibliographic (bib) records. It also explains how to link bib records with each other, and how to work with linking tags.
- Chapter: Chapter 5, "Authority Records" on page 113 explains how to create and work with authority records. It also explains how to create and delete cross-references.
- Chapter: Chapter 6, "Item and Copy Records" on page 134 explains how to create, edit, move, and print both item and copy records. It also explains how to print spine labels.
- Chapter: Chapter 7, "Workforms" on page 214 explains how to create, copy, edit, rename, and delete templates (workforms) for MARC records.
- Chapter: Chapter 8, "Control Records" on page 229 describes control records and explains how to use them.
- Chapter: Chapter 9, "Importing and Exporting Records" on page 235 explains how to import and export records, including how to use SQL statements for these processes. It also explains the errors Horizon may display during importing, and how to resolve them.
- Chapter: Chapter 10, "Non-MARC Editing" on page 265 explains how to create and use both non-MARC records and non-MARC workforms. It also describes how to convert MARC records into non-MARC records, and vice versa.
- Appendix: Appendix A, "ALA Hex Sets" on page 272 lists codes for special characters that you cannot enter from the special character list.
- Appendix: Appendix B, "SQL Statements" on page 275 contains the table names and columns you can use when creating SQL statements.
- Appendix: Appendix C, "Glossary" on page 278 includes definitions of many terms used in this guide.
- **Index** on page 283 is the index for this guide.

Conventions used in this guide

This guide uses terms, typefaces, and symbols to denote different kinds of information. Understanding these conventions can help you recognize the information you need more quickly.

Symbols

This guide uses these symbols:

Symbol	Description
	**Tip** This symbol indicates additional notes or helpful tips.

Symbol	Description
	**Important** This symbol indicates important information or warnings.

Mouse conventions

The following terms are used in this guide to describe actions you do with a mouse.

Term	Definition
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 once.
Drag	To press and hold the primary mouse button while moving the mouse.
Choose	To click a button or an option from a menu, group of options, or list.
Select	To click once on an option in a list so that the option is highlighted. In a field, you may drag the mouse over text to select that text.

Keyboard conventions

This guide refers to keys following the standard convention of 101-key keyboards. For example, Ctrl is the control key, Alt is the alternate key, Enter is enter or return.

When you need to press two or more keys at the same time to do an action, the keys are connected with a plus sign (+). For example, **Alt+H** means to press and hold the **Alt** key while you also press **H**.

Keys you press appear in bold type in steps. Text or numbers that you need to enter using the keyboard also appear in bold (for example, “Type **main** in the **Location** field”).

Other conventions

In step-by-step instructions, the names of menus, buttons, fields, and other options appear in bold type (for example, “the **OK** button” or “the **Title** field”). This helps you quickly identify which elements you should look for on the page or screen you are navigating.

When you are instructed to choose an option from a menu, the menu and menu options are separated by the greater-than symbol (>). For example, “choose **File** > **Save**” means to choose the File menu, then choose the Save option from the menu. This convention is also used to show the sequence of items you use on the navigation bar to open a form or page.

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**.

File and directory names, code examples, and computer output appear in `Courier`.

Possible differences between the software and this guide

The names, labels, and sample windows in this guide reflect the default settings that are delivered with most new 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 system. For example, your system administrator can change labels and set up security to limit access to certain features.

Additionally, as you use the software, you can resize windows or customize your workspace. Consequently, your software environment may look and function differently than the environment described in the tasks in this guide.

This document is compatible with Horizon 7.5.4. Information in this document may also be compatible with later versions.

Documentation updates

Updates to this guide are posted to the customer support website between releases, as necessary. These updates provide corrections to unclear, incorrect, or incomplete information. They also provide documentation for enhancements that were not complete at the time the guide was first published.

You may access the customer support website at http://support.sirsidynix.com.

The customer support website requires a username and password. If you do not already have a username and password, contact your system administrator to receive one. If you are the system administrator for your library and need a username and password for the support website, please contact SirsiDynix Customer Support to receive one.

Documentation updates can include, but are not limited to, the following formats:

- PDF (Portable Document Format)
- HTML Webhelp
- EPUB
- Microsoft Word

To view a PDF file, you must install Adobe's Acrobat Reader on your workstation. You can download Acrobat Reader free of charge at Adobe's web site, http://www.adobe.com. Several open source eReaders are also available online which can open other formats such as EPUBs. Please contact SirsiDynix Customer Support if you are having trouble finding this guide in the format that you need.

Comments and suggestions

SirsiDynix welcomes and appreciates your comments on its documentation. We want to know what you think about our manuals and how we can make them better. If you have comments about this guide, please send them to docs@sirsidynix.com.

Be sure to include the title and version number of the guide and tell us how you used it. Then tell us your feelings about its strengths and weaknesses and any recommendations for improvements.

Chapter 1: Getting Started

This chapter provides you with the basic information you need to begin using Horizon Cataloging. It gives you an overview of this guide, a review of some basic Horizon tasks and the Launcher interface, and an overview of Cataloging.

This chapter contains these sections:

Horizon Basics

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.

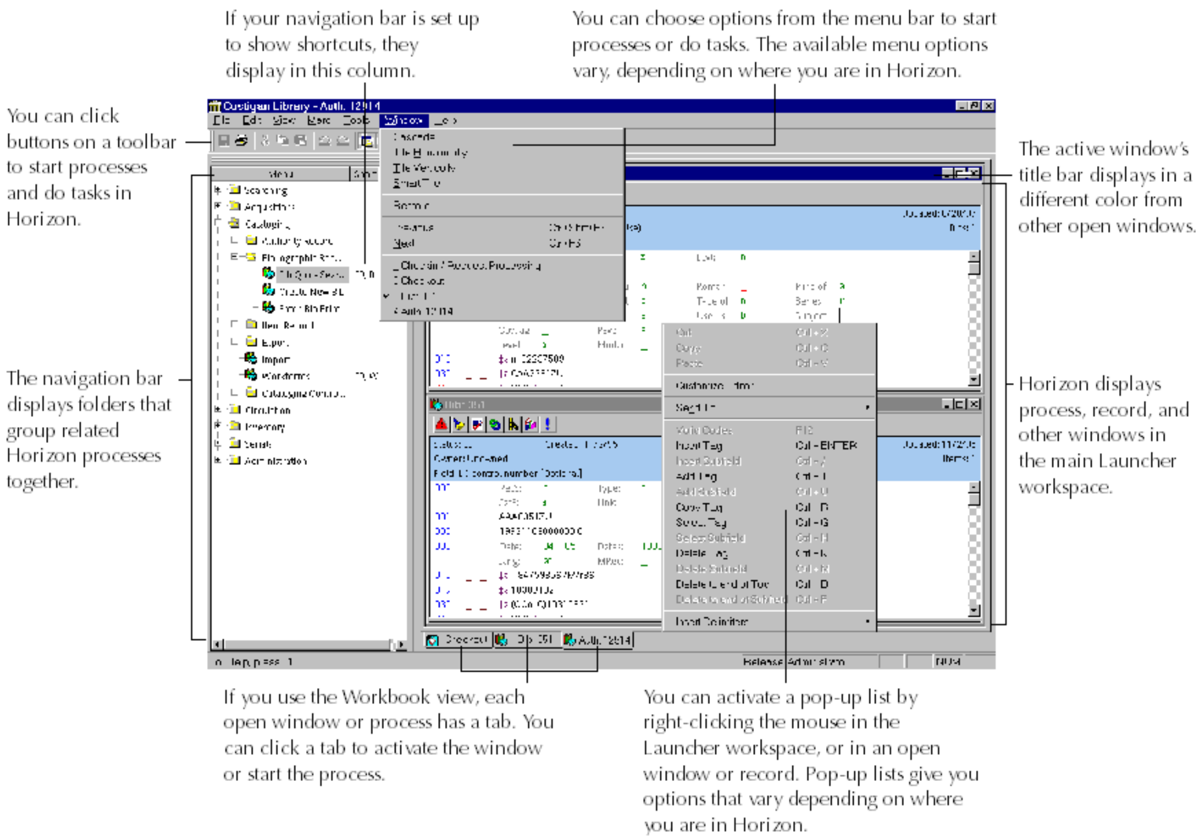
If you do not know how to do these tasks, see the Windows online help, your Microsoft Windows manual, or the *Horizon Basics Guide*.

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



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

This section explains these topics:

- **Starting a Horizon Process** on page 2
- **Customizing the Launcher** on page 4

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.

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.

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 on page 2.)

This section explains these topics:

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.) You can also edit or create shortcuts for many of the functions in the MARC Editor. (For instructions, see Chapter: Chapter 2, "Customizing the MARC Editor" on page 12.)
- **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.

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 a variety of ways.

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.

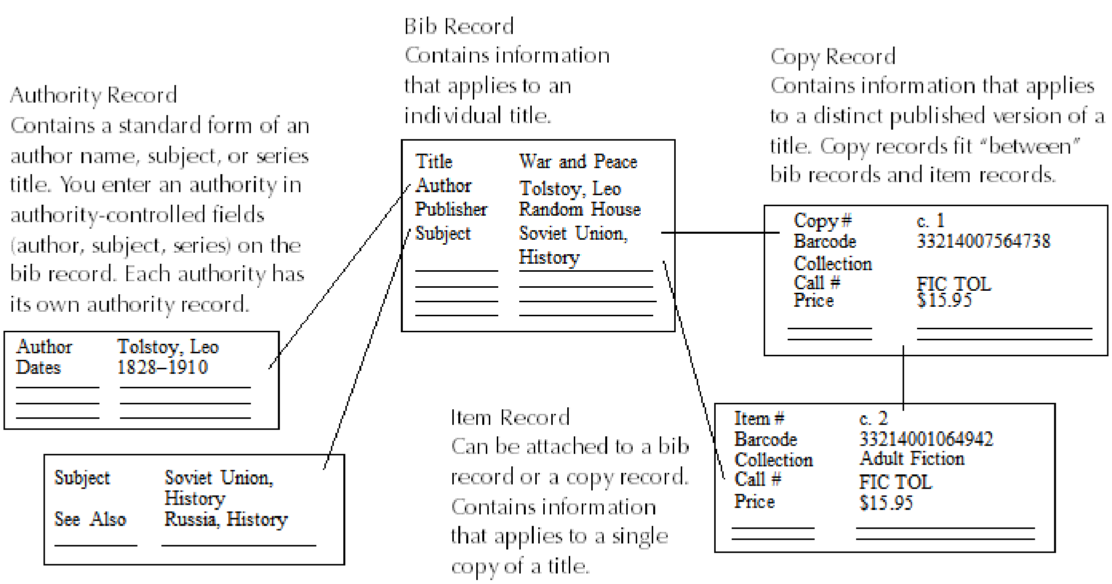
- **Toolbars**. You can create a new toolbar or modify an existing toolbar’s appearance and design so that the toolbar shows only the processes you use frequently.

- **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.

Cataloging Basics

Cataloging is the process of identifying the items in your library and defining their content so that borrowers can find the information they need on your shelves easily and efficiently. Machine-Readable Cataloging records, or MARC records, make it possible for library staff members to use computers to store and access cataloging information. After MARC records are entered into your library's database, borrowers use computer workstations to search the database. They use the search results to find items on your shelves.

When you catalog a new title, you use four kinds of records: bib records, authority records, item records, and copy records. Each record contains different kinds of information:



If you use MARC records, you can automatically add MARC bib and authority records to your database by importing them. You can also set up your system so that item records are created automatically when you import the bib records. After you import records, you can manually create more item records as you receive more copies of a title. You can also export records from your database to other databases and servers.

You can manually create bib, authority, copy, and item records in Cataloging. These records can be in MARC or non-MARC format. Cataloging provides templates, called workforms, that you use when you enter data to create a record in Horizon’s database. By setting up a workform ahead of time, you can more easily remember which data you most likely need to enter when you create a certain type of record.

Although most cataloging functions inside Horizon work without further setup, your system administrator must set up some options in Cataloging before you can use them. (For more information, see the *Cataloging Setup Guide*.)

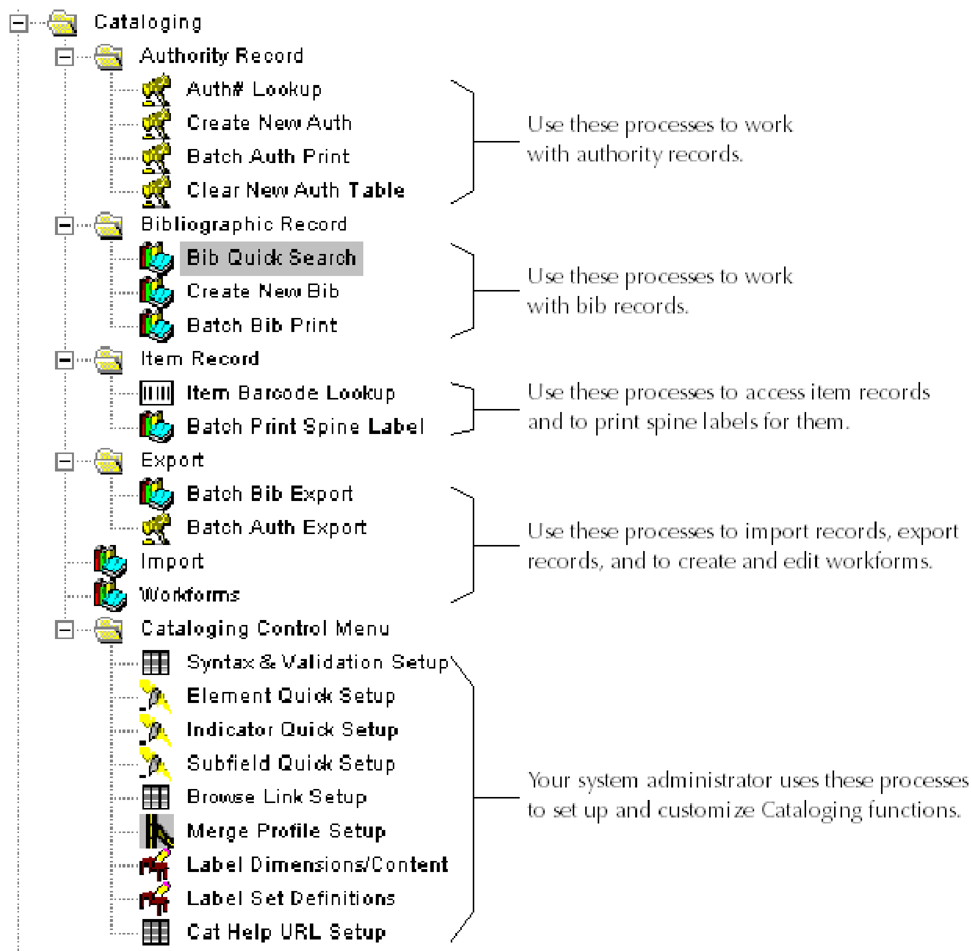
This section explains these topics:

- **Cataloging Processes** on page 6
- **Cataloging Security** on page 7
- **Overview of Cataloging Tasks** on page 10

Cataloging Processes

When you first install Horizon, the Cataloging folder on the navigation bar contains these folders and processes.

Figure 1-1: Cataloging Processes



You may see only some of these Cataloging processes on your navigation bar. Your security setup and Launcher configuration determine which processes are available on your navigation bar and where they display. (For more information, see your system administrator or the *Launcher Configuration Guide*.)

Cataloging Security

Horizon applies security options for each function in Cataloging. Your system administrator determines which functions are available to the various staff members based on their user privileges. (For more information, see the "Security and Preferences" chapter of the *System Administration Guide*.)

This section explains these topics:

- **Passkey Privileges for Cataloging** on page 8
- **Role Privileges for Cataloging** on page 9

Passkey Privileges for Cataloging

Your system administrator can give you access to many Horizon views and program features using passkeys. Many of these features relate to parts of Horizon other than Cataloging (for example, Circ Slip Messages or Lister View Definitions). However, if you have a small library, you may need access to some of these features.

Here is a list of views and program features that your system administrator can let you access:

Alternate Horizon Views	Batch create items
Bib Category Codes for Elements	Bib Co-tag Definitions
Binding Status Codes	Calendar Exceptions
Chronology Interpretation	Chronology Pattern Codes
Chronology Pattern Parts	Circ Slip Messages
Circulation Slip/Receipt	City, State Codes
Copy item record	Create a new item record
Create copy records	Create summary of holdings
Define Linking Tag	Delete copy record
Delete item	Edit copy record
Edit item record	Edit summary of holdings
Home Service Delivery Types	Horizon Column Definitions
Horizon Database Customizations	Horizon Database Info (PAC)
Horizon Domain Values	Horizon Server Info (PAC)
Horizon Upgrade Logs	Label Content Definition
Label Contents Editing	Linked Views
Lister View Definitions	Location Addresses
Locations whose blocks to display	MARC field usage definition
Media Collection	Media Delivery Location
Media Return Location	Media Type Codes
Menu Options	mq_index processor codes

Edit View Definitions	Non-MARC Fields
Non-MARC Field Definition	Non-MARC to MARC mappings
Optional Borrower List	PAC Flavor: Servers
PAC Flavor: ZServers	PAC restriction location
Print formats for Circulation blocks	Program Features
Publication Patterns	Relink copies
Relink items	Restrictions for PAC by Flavor
Run Codes	Secured record security groups
Serials Checkin Locations	Service Classes
Services	Sort Weight Table
Stat Category--Horizon only	Stat Dayend Control-Horizon
Stat Report Labels--Horizon only	Summary Binding pull List
Table to assist with Sybase Security	Title Restriction (for PAC)
Typical Library Week	View Sets
Word Index Edit	Word Index group limit edit
X.12 Claim Response Codes	X.12 Media Type Codes
XlMop Menus	Z39.50 Database Attr. Info.
Z39.50 Databases	Z39.50 Server Info

Role Privileges for Cataloging

Here is a list of the cataloging-specific privileges that your system administrator can assign to the Cataloging (Cat) role privilege:

Authority Auth # Lookup	Authority Batch Auth Export, Auth Export
Authority Batch Auth Print	Authority Clear New Auth Table
Authority Edit Status Record	Authority Global Change
Authority Link Authority Records	Authority Merge Records
Authority New	Bibliographic Batch Bib Export, Bib Export

Bibliographic Batch Bib Print	Bibliographic Bib Quick Search
Bibliographic Convert to Non-MARC	Bibliographic Copy Bib Record
Bibliographic Create New Bib	Bibliographic Edit Status Record
Bibliographic Link Always on Authority Controlled Tag	Bibliographic Link Bib Records
Bibliographic Link Never on Authority Controlled Tag	Bibliographic Link on Match Authority Controlled Tag
Bibliographic Link to Authority	Bibliographic Merge Records
Bibliographic Unlink Authority	Enter Special Characters
General (Item Barcode Lookup, Item/Copy List, Batch Print, Print Spine Labels)	Import MARC Record Import
Label Dimensions/Context	Label Set Definitions
MARC Editor	Non-MARC Add Field
Non-MARC Convert to MARC	Non-MARC Delete Field
Workforms	

Overview of Cataloging Tasks

When you catalog an item in your library, you record data about the item such as its name, the kind of information the item contains, and the call number that indicates the location of the item on your shelves. Borrowers look at this data when they search your catalog to decide which items in your library will be most helpful to them. Horizon Cataloging includes many tasks that can help with your cataloging workflow. It also includes the ability to change the appearance of your Cataloging workspace, and the way you work in the MARC Editor.

For example, you can set up options in the MARC Editor that determine things such as how you link records, how you import or merge records, and how your MARC records display in the MARC Editor. You can also set up keyboard shortcuts for the MARC Editor functions you use most often. You can change these options at any time.

In general, cataloging work in Horizon consists of these kinds of tasks:

- **Working with MARC records**. MARC records hold the information that lets your borrowers find items in your library when they search your catalog. You can create, import, export, and print bibliographic, authority, item, and copy MARC records in Horizon.
- **Working with non-MARC records**. If you prefer, you can use non-MARC records instead of MARC records. However, non-MARC records have some limitations that MARC records do not.

- **Maintaining your collection**. You can use Horizon to help plan the growth of your library collection by creating selection lists. You can keep your catalog current by editing, merging, linking, and deleting records. You can create *See* and *See Also* references and Uniform Title entries for the catalog to help your borrowers find related items. You can also create holdings summaries for the serials to which your library subscribes.

In addition to giving you rights to access features in Cataloging, your system administrator may need to set up some features before you can use them. (For example, before you can merge records, your system administrator must set up merge profiles.) (For instructions, see “Setting Up a Merge Profile” in the *Cataloging Setup Guide*.)

Chapter 2: Customizing the MARC Editor

This chapter explains how to customize the MARC Editor to control the display of MARC records.

This chapter contains these sections:

About the MARC Editor

You create and edit the MARC records your library uses to store data by using Horizon's MARC Editor. The MARC Editor gives you a word-processor-like setting where you can easily work with bibliographic (bib), authority, item, and copy records. (For more information, see Chapter: Chapter 3, "MARC Editing" on page 40.)

You can choose to customize the way the MARC Editor displays MARC records. You do this in the Customize Editor. Some customization options separate and differentiate the information on the record, which makes the information easier to read and revise. Other options set user defaults for the MARC Editor's basic appearance and features.

Your system administrator determines whether the changes that you make in the Customize Editor stay in effect until you change them again or only until you log out.

This chapter explains how to open the Customize Editor. It also explains how to change the attributes of the MARC Editor by clicking on and changing settings in these tabs of the Customize Editor:

Tab	Description
Customizing General Options on page 14	This tab lets you choose default views, automatic linking, default authority record link types, and automatic error checking in records.
Changing Profile Options on page 24	This tab lets you choose a Browse Link search flavor, an import source for bib-to-bib linking, and default merge profiles.
Choosing a Background Display on page 27	This tab lets you define the background and text colors for the header and the background color for the MARC Editor workspace.
Changing Font Options on page 28	This tab lets you choose the font type and size for MARC records.
Choosing Field Options on page 30	This tab lets you set text color and font styles for each cataloging field in the MARC record. It also lets you set the colors for errors, Web links, delimiters, and read-only fields.
Choosing Spacing Options on page 33	This tab lets you define label widths, column widths, and spacing between columns in a MARC record.
Customizing Keyboard Shortcuts on page 35	This tab lets you modify keyboard shortcuts for commonly performed functions.
Changing Delimiters on page 36	This tab lets you choose alternate delimiters for subfields; non-sorting, sorting-only, and embedded ALA characters; and part-lines (UNIMARC standard only).

Opening the Customize Editor

You customize the MARC Editor in the Customize Editor. You can access this window only when you have a MARC record or MARC workform open.

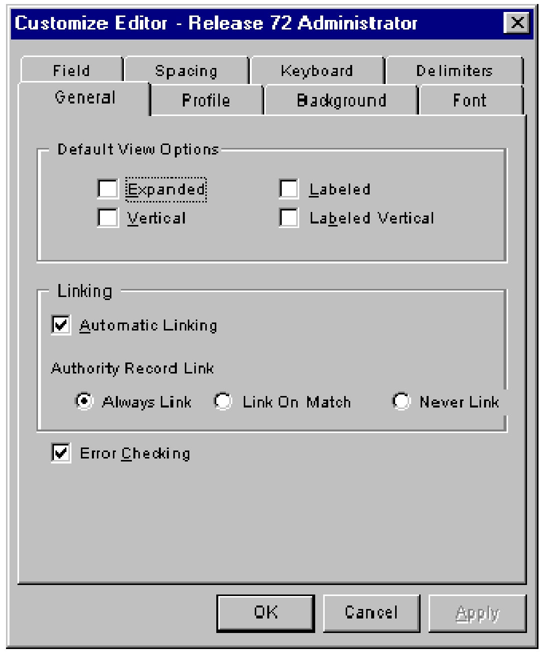
To open the Customize Editor

1 Do one of these options:

- Open a MARC record. (For instructions, see Chapter: , "Opening a MARC Record" on page 44.)
- Open a MARC workform. (For instructions, see **Finding and Opening a Workform** on page 226.)

2 Choose **Tools, Customize Editor**.

Horizon opens the Customize Editor:



When you customize the MARC Editor settings, the changes become the default settings for all MARC records on your workstation. Your system administrator determines whether your changes stay in effect after you log out.

Customizing General Options

You use the General tab of the Customize Editor to specify things that affect all MARC records, such as the way they display, how they link, and whether Horizon checks them for errors.

This section explains these topics:

- **Changing the Default View** on page 14
- **Choosing Automatic Linking between Records** on page 19
- **Choosing the Default Authority Link Type** on page 20
- **Activating Error Checking in Records** on page 22

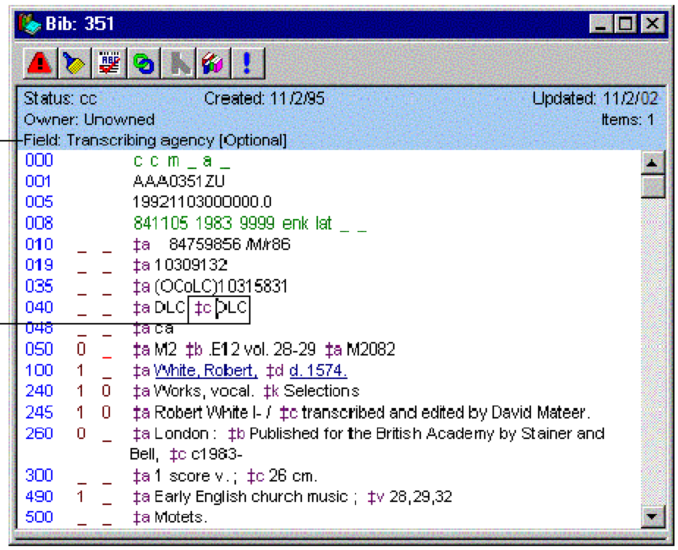
Changing the Default View

You specify a MARC Editor default view for your workstation on the General tab. This default view establishes which view the MARC Editor uses each time you open a MARC record. You can override the default at any time by choosing the View option from the menu bar and then choosing the view or combination of views that you want to use. If you find that you often override the default to use the same view, you might want to change your default view.

Each view option represents a different format in which Horizon can display the information in a MARC record. You can choose to display information in these ways:

- **Regular View**. The regular view displays each tag in a single line of information. Subfields follow each other on the same line (unless they wrap to the next line). The subfield on which the insertion pointer lies is described in the header. If the insertion pointer is in a fixed field, the header also shows the field value. The body of the record displays no labels.

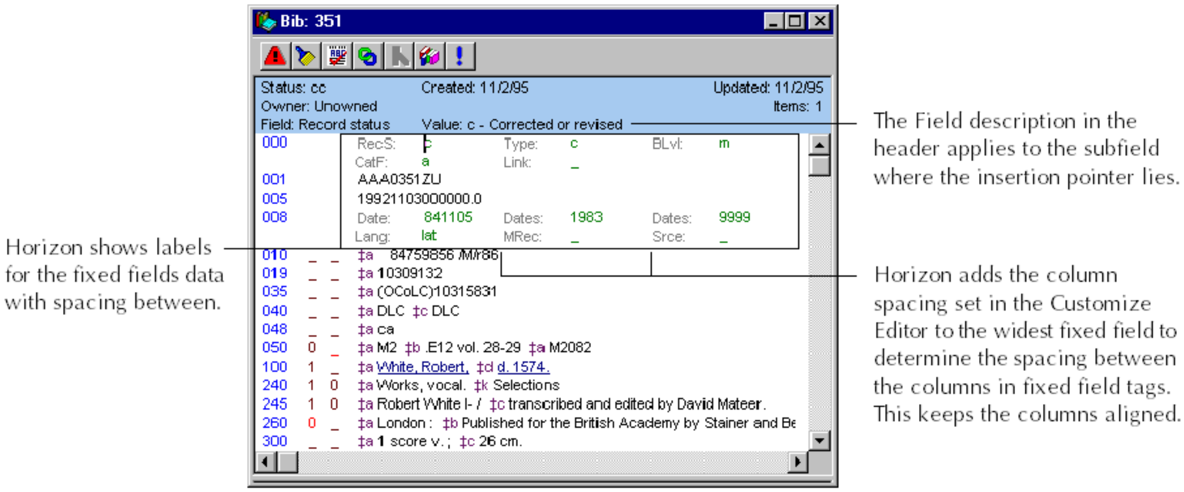
  Here is an example of a bib record with a regular view:

  The Field description in the header applies to the subfield where the insertion pointer lies.

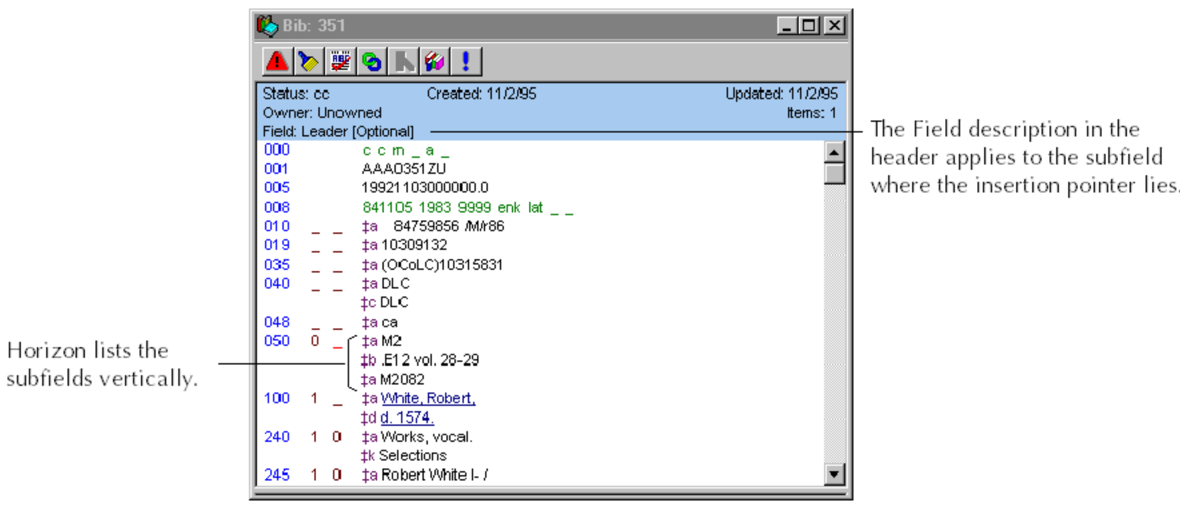
- **Expanded View**. The expanded view displays labels for only the fixed fields and puts a specified amount of space between each fixed field. (For instructions on configuring spacing, see **Choosing Spacing Options** on page 33.) Your system administrator can change the labels. (For instructions, see “Setting Up or Changing Basic Tag Information” in the “Setting Up or Changing Valid MARC Record Components” section of the *Cataloging Setup Guide*.) The subfield on which the insertion pointer lies is described in the header. If the insertion pointer is in a fixed field, the header also shows the field value.

  Here is an example of a bib record with an expanded view:



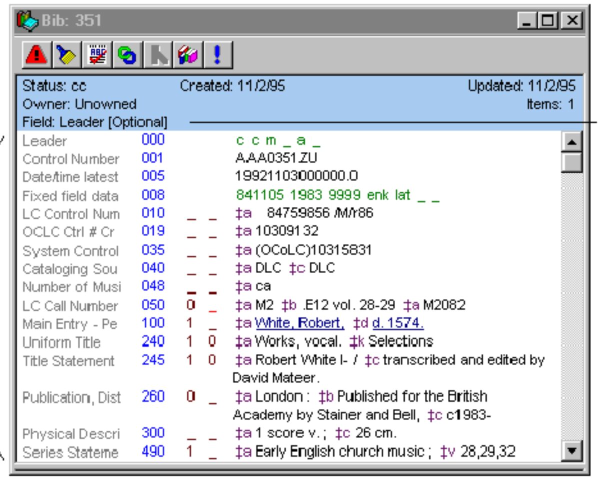
- **Vertical View.** The vertical view displays each subfield on a separate line. The subfield on which the insertion pointer lies is described in the header. If the insertion pointer is in a fixed field, the header also shows the field value.

  Here is an example of a bib record with a vertical view:



- **Labeled View.** Like the regular view, the labeled view displays each tag in a single line of information. Subfields follow each other on the same line (unless they wrap to the next line). However, this view displays a label for each tag. Your system administrator can change the labels. (For instructions, see “Setting Up or Changing Basic Tag Information” in the “Setting Up or Changing Valid MARC Record Components” section of the *Cataloging Setup Guide*.) The subfield on which the insertion pointer lies is described in the header. If the insertion pointer is in a fixed field, the header also shows the field value.

  Here is an example of a bib record with a labeled view:

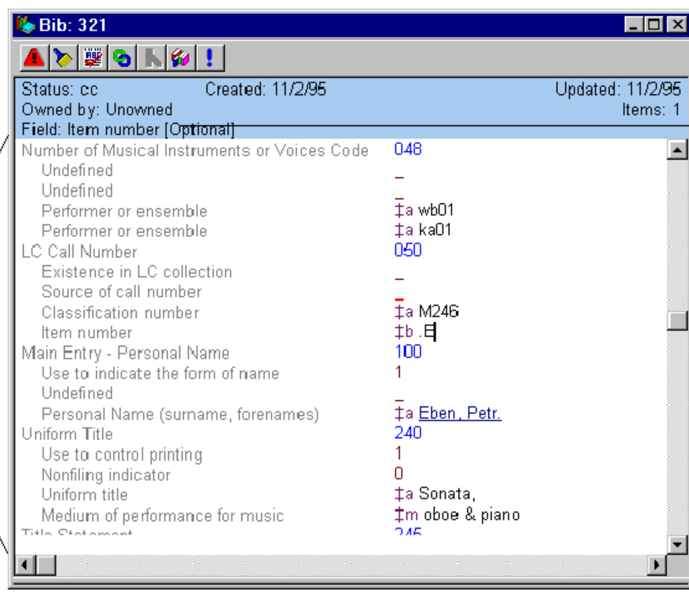


Horizon puts the labels for the tags on the left.

The Field description in the header applies to the subfield where the insertion pointer lies.

- **Labeled Vertical View.** The labeled vertical view displays each item on a separate line and shows labels for each tag, indicator, and subfield. Your system administrator can change the labels. (For instructions, see “Setting Up or Changing Valid MARC Record Components” in the *Cataloging Setup Guide*.)

  Here is an example of a bib record with a labeled vertical view:



Horizon lists the tags, indicators, and subfields vertically, along with their labels.

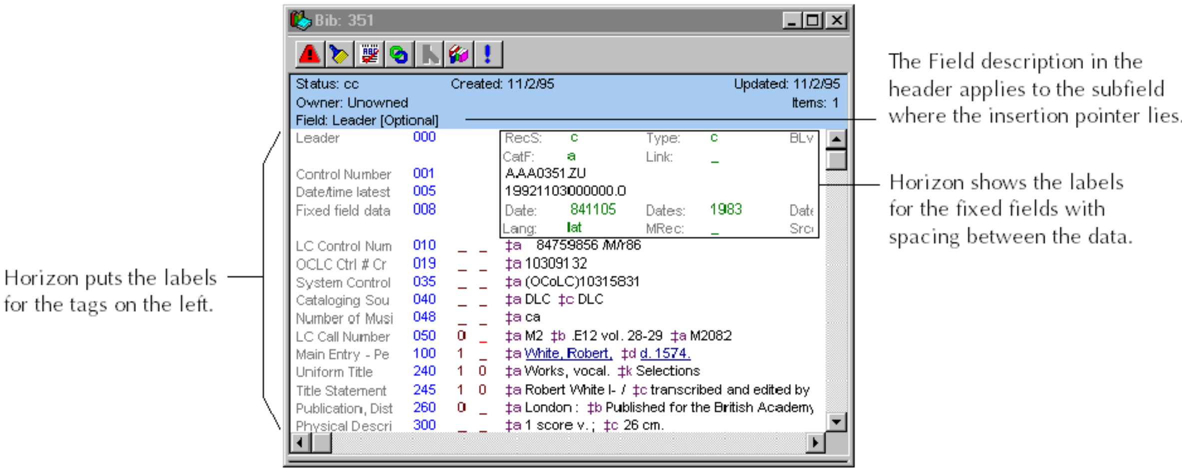
The Field description in the header applies to the subfield where the insertion pointer lies.

When you choose a Labeled Vertical view, Horizon grays out the Labeled and Vertical boxes in the Customize Editor dialog box. If you choose both the Labeled and Vertical views instead of this view, Horizon displays the indicators on the same line as the tag numbers and displays labels for only the tags. (For an example, see **Combined Views. You can combine many of the views.** on page 17.)

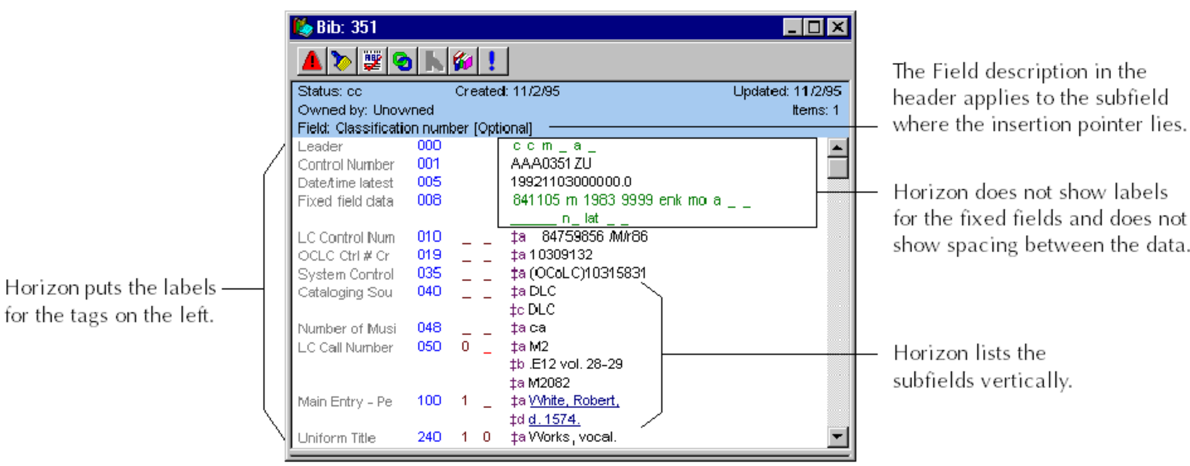
- **Combined Views.** You can combine many of the views.

  For example, you can mark both the labeled and the expanded view to have your record display in a labeled and expanded format. The record displays with labels for each tag, and the fixed fields are labeled with space between each position. Your system administrator can change the labels. (For instructions, see “Setting Up or Changing Valid MARC Record Components” in the *Cataloging Setup Guide*.)

Here is an example of a bib record with both the labeled and expanded views marked:



Here is an example of a bib record with both the labeled and vertical views marked:

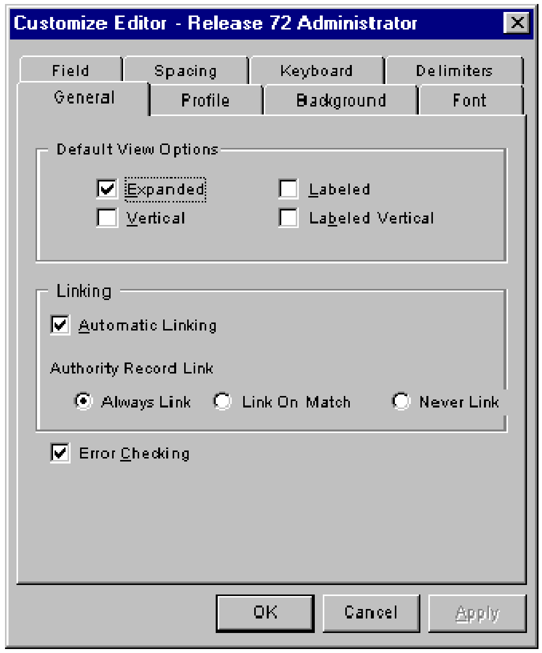


Other options in Customize Editor can affect the way your MARC records display.

To change the default view

1 In the Customize Editor, click the **General** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

Horizon displays the General tab of the Customize Editor:



2 Mark the boxes in the **Default View Options** group that describe the view that you want to use as your default.

3 Click **OK** to save your changes.

Choosing Automatic Linking between Records

Certain tags and subfields in a MARC record contain data that should remain consistent in every record that uses that data. (For example, a Library of Congress subject should be identical in every bib record that uses the subject.) The records that contain this consistent data are called authority records. To help maintain the integrity of your database, Horizon lets you link bib records to authority records using the appropriate tags and subfields.

You can also link bib records to bib records (for example, related items, such as translations or series) and authority records to authority records (for example, for *See* or *See Also* references). (For more information, see **Linking Bib Records** on page 100, **Working with Cross-References** on page 124, and **Working with Uniform Titles** on page 127.)

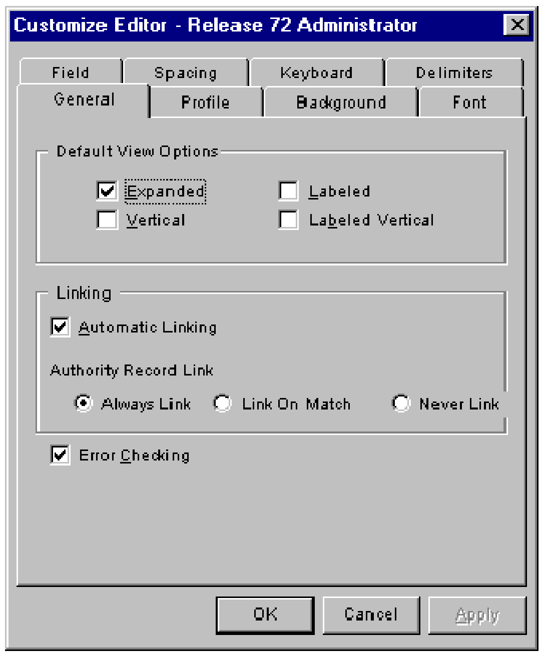
You can link MARC records manually. You can also choose to have Horizon link MARC records automatically. When you enable automatic linking, Horizon tries to link text that you enter in a linking tag or subfield to the appropriate linking record in the database when you move the pointer out of the linking tag or subfield. (If you do not enable automatic linking, Horizon tries to link text in a linking tag when you save the record.) Automatic linking works for all types of links except links to Web addresses, which Horizon links as you type the address into the subfield.

The linking action that Horizon performs with authority records also depends on the authority record link type that you choose. (For instructions on choosing a default link type, see **Choosing the Default Authority Link Type** on page 20. For more information on linking authority records, see **Linking Authority-Controlled Records to Bib Records** on page 57.)

To set up automatic linking between records

1 In the Customize Editor, click the **General** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

Horizon displays the General tab of the Customize Editor:



2 Mark **Automatic Linking** in the **Linking** group.

3 If necessary, set the link type. (For more information, see **Choosing the Default Authority Link Type** on page 20.)

4 Horizon links records according to these settings until you change them.

5 Click **OK** to save your changes.

Choosing the Default Authority Link Type

When you choose a default authority link type, Horizon uses it to help determine when to link authority records to other appropriate records. (For example, if you choose Never Link, Horizon saves the text you enter in an authority link tag without trying to find a link for the record in your database. This lets junior personnel make entries now, while letting senior staff members change the link status and link the text later.)

If you change a default authority link type, it affects only the bib-to-authority linking tags that you create after you make the change. Any record already created retains the linking types it had when it was created. (In some cases, these types may display as “unknown.”)

You choose a default authority link type whether or not you choose Automatic Linking. If you choose Never Link, authority records never link even if you choose Automatic Linking.

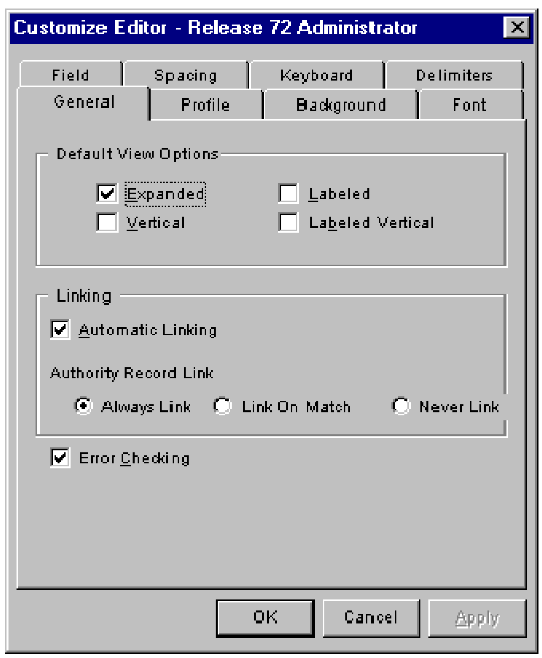
You can change the link type for a single link any time before you save the record containing the link tag. You do this by choosing Edit, Link Options, Authority Link Type from the menu bar, and then choosing one of the link types in the drop-down menu. If you find that you often override the default to use the same link type, you might want to change your default link type.

For more information about link types and linking, see **Linking Authority-Controlled Records to Bib Records** on page 57.

To choose the default authority link type

1 In the Customize Editor, click the **General** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

Horizon displays the General tab of the Customize Editor:



2 In the **Linking** group, mark the type of authority record link that you want to use as the default:

- **Always Link.** Links the bib record to an existing authority record in your database. If an authority record does not exist, Horizon creates one.

- **Link On Match**. Links the bib record to an existing authority record in your database. If a matching authority record does not exist, Horizon does not create one. Later, if you create a matching authority record, Horizon creates the link when you save the record.
- **Never Link**. Horizon does not link the bib record to an authority record, whether or not a matching authority record exists in your database.

3 Click **OK** to save your changes.

Activating Error Checking in Records

Errors occur when you add invalid tags, indicators, or subfields, or when you repeat non-repeatable subfields in tags. The MARC Editor helps you identify errors within your records. (For example, the MARC Editor displays tags that are invalid.) If your record has errors in it, Horizon still lets you save the record.

Horizon does not save a record if the error is in a tag or subfield that is a Mandatory Fatal or Non-Repeatable Fatal tag or subfield. (For more information, see "Setting Up or Changing Valid MARC Record Components" in the *Cataloging Setup Guide*.)

Horizon has two different methods to reveal errors in a record:

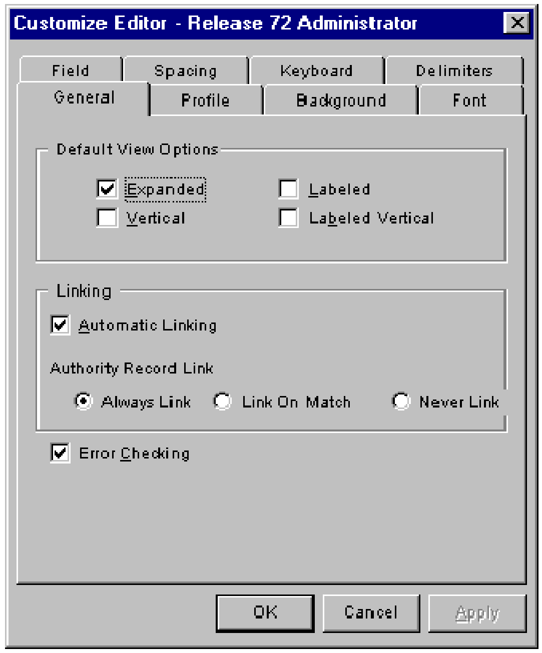
- Errors display in a different color in the record. You can change the color. (For instructions, see **Choosing Field Options** on page 30.)
- Error messages display in a splitter window at the bottom of the record. Double-clicking on an error message positions your cursor in the record at the error so that you can correct it easily. The splitter window can be resized to show as much of the error list as you want.

You must mark Error Checking on the General tab if you want the MARC Editor to identify errors and display error messages. If you do not turn on error checking, Horizon displays "Error checking is turned off" in the error window and the errors do not show as a different color in the tags.

To activate error checking in records

1 In the Customize Editor, click the **General** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

Horizon displays the General tab of the Customize Editor:



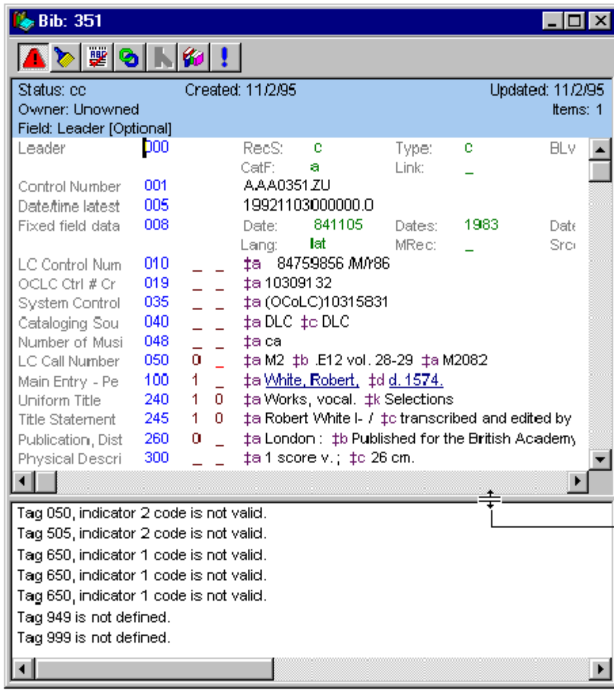
2 Mark **Error Checking**.

3 Click **OK** to save your changes.

4 To display the contents of the error window at the bottom of any open MARC record, do one of these options:

- Click the **Show/Hide Errors** icon ( ) in the editing window toolbar.
- Do these steps:
  - Move the pointer over the bottom of the MARC record until the resize pointer ( ) displays.
  - Drag the splitter bar upward to open the error window.

Horizon shows a list of errors in an error window below the bib record:



Changing Profile Options

The Profile tab gives you options that help automate Horizon linking processes. You can choose the search flavor for your Browse Link searches and change the default import source for bib-to-bib linking. You use Browse Link to help you find existing authority records before you create a linking tag. The import source defines the way bib-to-bib linking works. You can also change the default merge profile for merging records on the Profile tab.

Your system administrator must set up all three of these features.

This section explains these topics:

- **Setting a Browse Link Flavor** on page 24
- **Choosing the Import Source for Bib-to-Bib Linking** on page 25
- **Choosing a Merge Profile** on page 26

Setting a Browse Link Flavor

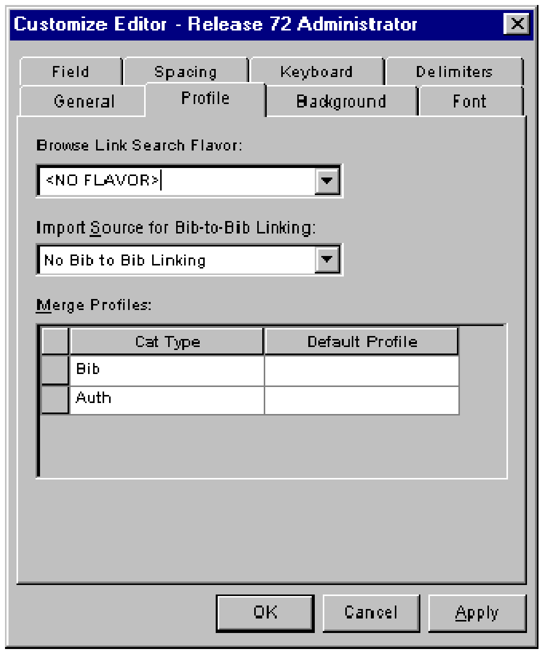
If your system administrator has set up Browse Link, you can choose the PAC flavor that you want Browse Link to use. Browse Link gives you a fast access to authority records in your database by working with search types that your system administrator sets up. This setting overrides any setting that your system administrator makes using the /f switch. However, if you leave the setting at <NO FLAVOR>, then Horizon uses the /f switch setting. If you try to use Browse Link and

Cataloging Setup Guide and the “Switches” section of the “Security and Preferences” chapter of the *System Administration Guide*.)

To set a Browse Link flavor

1 In the Customize Editor, lick the **Profile** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

Horizon displays the Profile tab of the Customize Editor:



2 In the **Browse Link Search Flavor** field, use the drop-down list to choose the flavor that you want.

3 Click **OK** to save your changes.

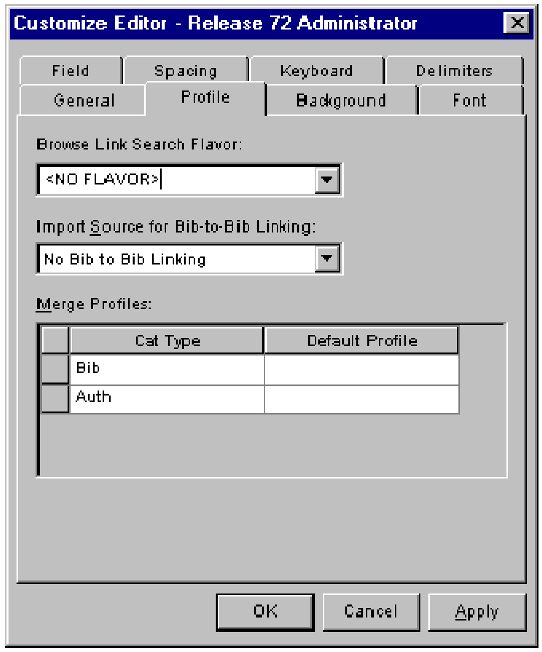
Choosing the Import Source for Bib-to-Bib Linking

You can choose how Horizon performs bib-to-bib linking by choosing an import source. Your system administrator must set up the Link Match Points in the import_ source table so that those parameters can control the linking. (For instructions, see “Setting Up Link Match Points” in the “Setting Up Import Source Parameters” section of the *Cataloging Setup Guide*.)

To choose the import source for bib-to-bib linking

1 In the Customize Editor, click the **Profile** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

Horizon displays the Profile tab of the Customize Editor:



2 Choose the profile that you want from the **Import Source for Bib-to-Bib linking** drop-down menu.

3 If your system administrator has not defined any link match points for an import source, no import sources display.

4 Click **OK** to save your changes.

Choosing a Merge Profile

A merge profile lets you define the parameters that Horizon uses when merging records. (For example, the merge profile determines which tags from the dying bib record are inserted into the surviving bib record.) The system administrator must set up merge profiles in the Cataloging Control Menu folder. (For instructions, see "Setting Up a Merge Profile" in the *Cataloging Setup Guide*.)

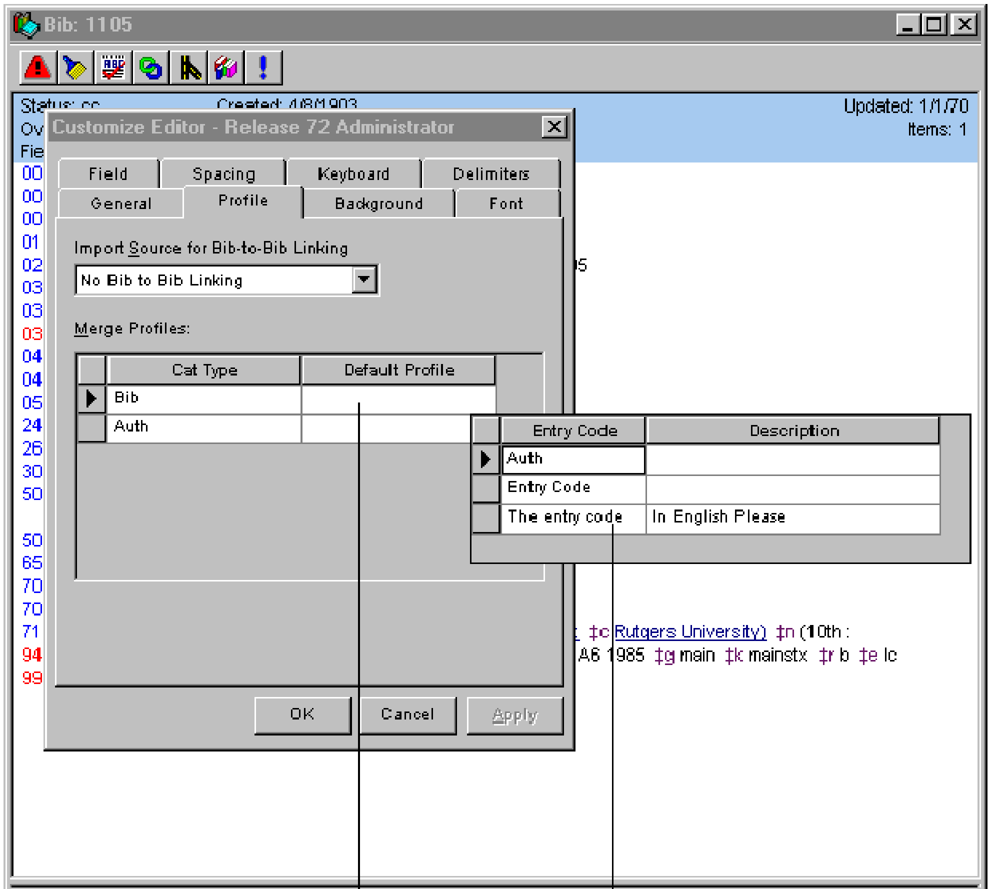
To choose a merge profile

1 In the Customize Editor, click the **Profile** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

2 Click the field in the **Default Profile** column for the type of record that you want to change.

3 Use the drop-down menu that Horizon displays for that field to choose the profile that you want to use as the default.

Horizon displays that profile in the Default Profile column:



When you choose the profile from the drop-down list, Horizon displays the profile name in the Default Profile column.

You choose the profile from the Merge Profile drop-down list.

4 Click **OK** to save your changes.

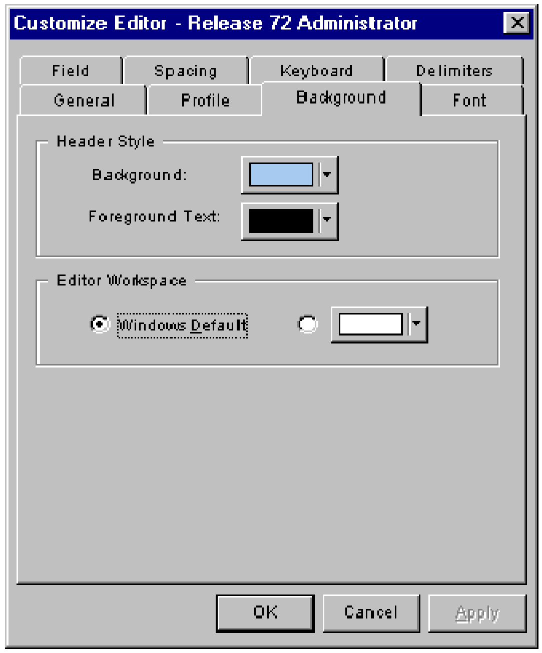
Choosing a Background Display

On the Background tab, Horizon lets you choose the background color that you want to use for both the header and the editor workspace. You can also choose the color of the header text.

To choose a background display

1 In the Customize Editor, click the **Background** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

Horizon displays the Background tab of the Customize Editor dialog box:



2 In the **Header Style** group, use the drop-down menus to choose the color that you want for the background and for the foreground text of the header.

(The header is the colored bar that displays at the top of each record that you open in the MARC Editor.)

3 In the **Editor Workspace** group, do one of these options:

- If you want to use the Windows default color as a background, mark **Windows Default**.
- If you want to change the background color, mark the button by the colored box and use the drop-down menu to choose the color you want.

Note: If you change the workspace background color, choose the new color carefully so that the various text options for tags, indicators, delimiters, subfields, and so forth do not blend in with the workspace background color that you choose. (For more information, see "Changing the Display Color for Explanations in Certain Dialog Boxes" in the "Getting Started" chapter of the *Horizon Basics Guide*.)

4 Click **OK** to save your changes.

Changing Font Options

You set a display font and font size for Horizon when you log in to Horizon. You can override that setting for only the MARC Editor by choosing a default display font and font size in the Customize Editor from the Font tab. You can also set a temporary font size that affects only the active MARC record that you are working with.

This section explains these topics:

- **Changing Default Font Options** on page 29

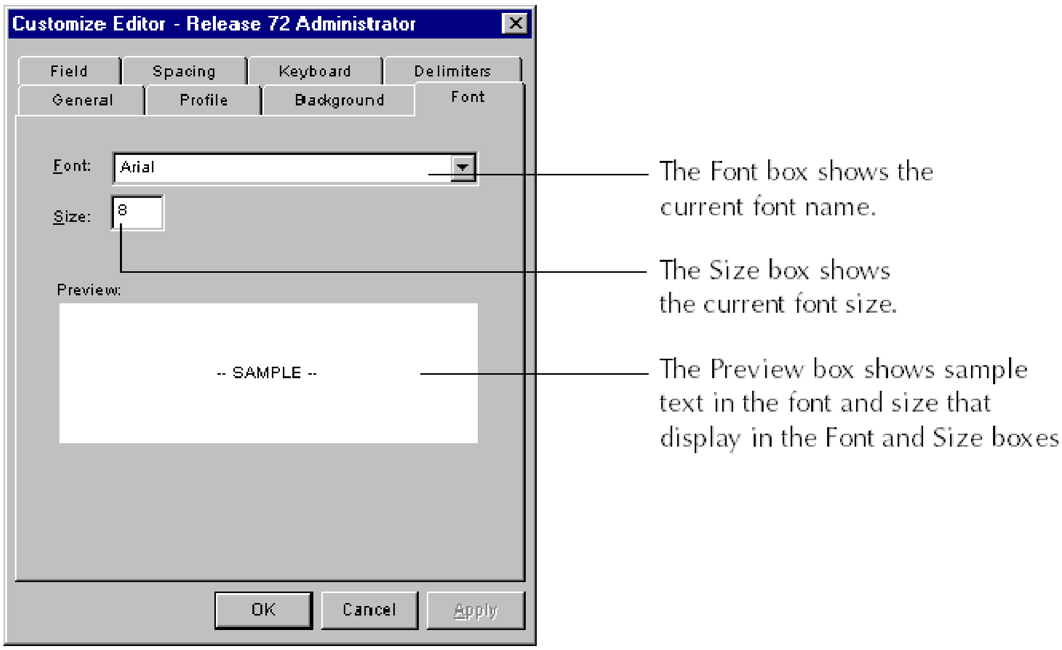
- **Changing the Font Size Temporarily** on page 29

Changing Default Font Options

To change default font options

1 In the Customize Editor, click the **Font** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

Horizon displays the Font tab of the Customize Editor:



2 Choose the name of the font that you want from the **Font** drop-down menu.

Note: If you want Horizon to display Unicode characters, you must choose a Unicode font.

3 Enter the font size that you want in the **Size** field.

4 Click **OK** to save your changes.

Changing the Font Size Temporarily

To change the font size temporarily

1 Open a MARC record. (For instructions, see **Opening a MARC Record** on page 44.)

2 Choose **Tools, Font Size.**

3 Click on the size that you want from the **Font Size** drop-down menu.

Horizon closes the drop-down menu and changes the size of the font only in the active record.

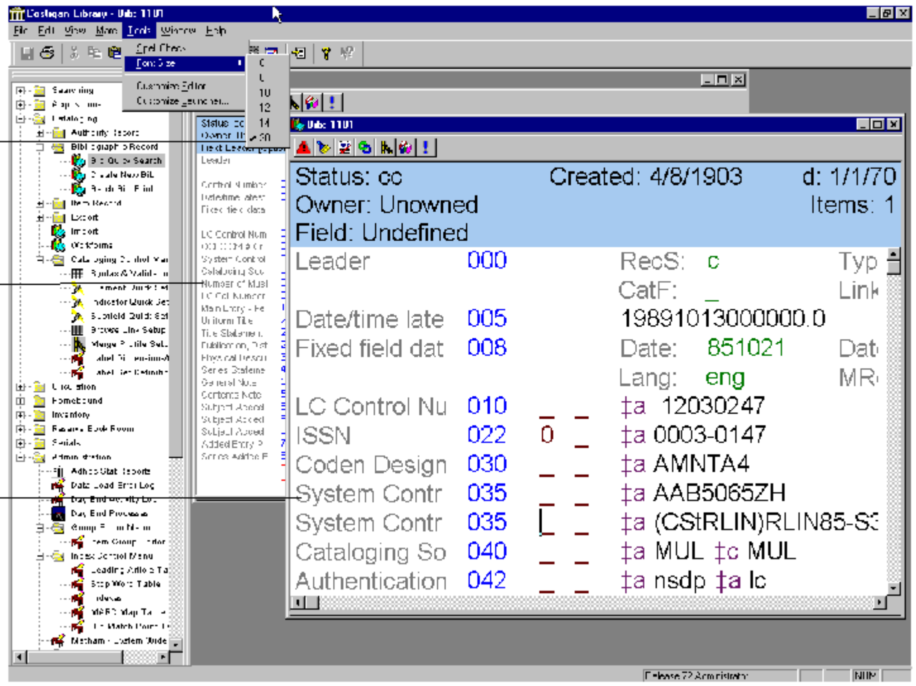
Note: The change of the font size affects the record only until you close the record.

Here is an example of a temporary font-size change in one record while two records are open:

This sets the active record to a 20 pt font size.

The inactive record still displays at the current default (10 pt).

Horizon displays the active record at 20 pt as soon as you choose that size from the Font Size drop-down menu.



Choosing Field Options

You can use different colors and font attributes for these parts of a MARC record:

- Cataloging fields
- Error text
- Web links
- Delimiters
- Read-only fields

Horizon comes with certain colors and font attributes already set as default. (For example, black text indicates variable field data, red text indicates an error, blue and underlined text indicates a link to another record, a slightly different shade of blue and underlining indicates a Web link, and so forth.) You can use the default settings as they are, or you can customize them.

You can use different colors and font attributes on a record to help you recognize the different kinds of information in the record. (For example, you can use green for subfield codes and black for subfield information.) You can also apply different font attributes, such as bold and underline, to set off specialized text from the rest of the record. If you mark errors by color, you can recognize the errors in a record without having to open the error messages window. (You must have error checking turned on for the color to display. For more information, see **Activating Error Checking in Records** on page 22.)

You can set the font color and attributes for the individual components of a record, such as fixed-field elements, fixed-field labels, indicators, and so forth. However, the color settings for error text, Web links, delimiters, and read-only text override the component settings.

You can also use different font attributes to display linked text in a MARC record. Horizon displays linked text attributes whether or not the focus is on that particular link. This helps you identify linked text.

Here are the default color and font attributes for the parts of a MARC record:

- **Fixed-Field Elements**. The data in fixed fields displays in green.
- **Fixed-Field Label**. The labels for fixed field elements display in gray.
- **Indicator**. Indicators display in brown.
- **Indicator Label**. Indicator labels display in gray.
- **Linked-Field Data**. Information linked to an authority or other type of linking record displays in dark blue and is underlined.
- **Subfield Code**. Subfield codes display in purple.
- **Subfield Delimiter**. Subfield delimiters display in purple.
- **Subfield Label**. Subfield labels display in gray.
- **Tag Label**. Tag labels display in gray.
- **Tag Number**. Tag numbers display in blue.
- **Unlinked-Field Data**. Information in a linking field that is not linked displays in dark blue.
- **Variable Field Data**. Variable field information displays in black.

Here are the default color and font attributes for types of text and markers:

- **Error Text**. If you enter an invalid tag, indicator, subfield delimiter, or other component (for example, a subfield that has not been defined or that is not repeatable), Horizon displays the text in red.
- **Delimiters**. Markers that you enter to identify special text display in orange. (This does not apply to subfield delimiters.)
- **Web-Links**. Web-links display in blue and are underlined.
- **Read-Only**. Read-only fields display in green.

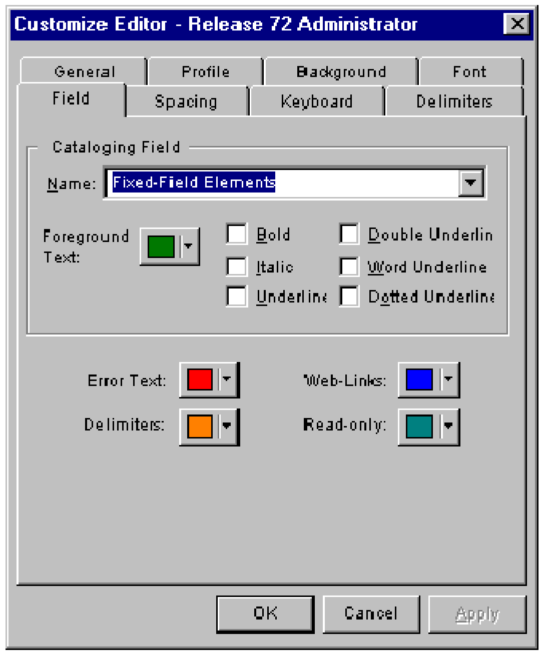
The color settings for these items override any settings that you make for the other parts of a MARC record.

Make sure that any colors that you choose on the Field tab contrast with the background color of your MARC records so that you can see and identify the cataloging record parts.

To choose field options

1. In the Customize Editor, click the **Field** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

   Horizon displays the Field tab of the Customize Editor:

2. Choose the element or field that you want to change from the **Name** drop-down list.

3. Choose the color that you want from the color options on the **Foreground Text** drop-down list.

4. Mark any options (bold, italic, underline, and so forth) that you want to apply to the text.

5. If you want to change attributes for another element or field, repeat steps See "Choose the element or field that you want to change from the Name drop-down list." through See "Mark any options (bold, italic, underline, and so forth) that you want to apply to the text." until you have changed the colors and attributes for all the elements or fields that you want to change.

6. Use the appropriate drop-down list to choose the color that you want to use for any of these options:

   - **Error Text**
   - **Web-Links**
   - **Delimiters**

- **Read-only**

7 Click **OK** to save your changes.

Choosing Spacing Options

In Horizon, MARC records display their components in a certain order and in columns. This can make them easier to work with. For some of these components, you can use the options on the Spacing tab to change how much room is allocated, how far apart the components display in the record, and how many columns Horizon uses to display the information. (For example, if your labels are long, you can give them more space so that Horizon has room to display them completely.)

Some spacing options affect the display of information that you see only in certain views. (For more information about views, see **Changing the Default View** on page 14.)

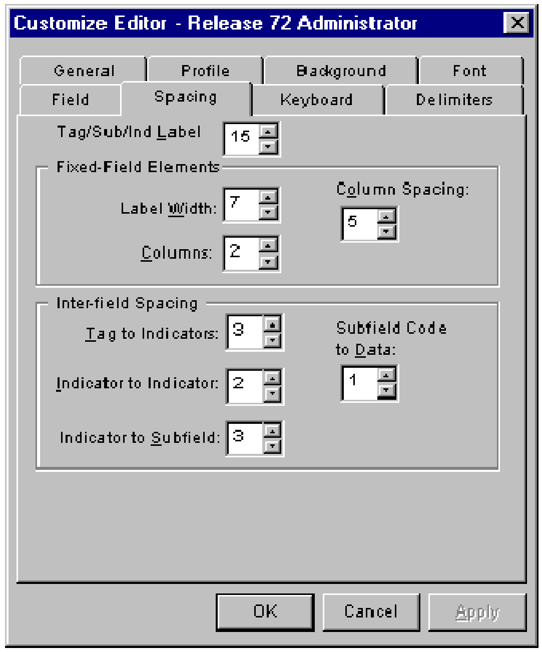
Here are the spacing changes that you can make in Customize Editor:

You can change this spacing	For these elements
Label width	Tag/Subfield/Indicator labels **Note:** Changing this value affects the label widths for all three label types. Fixed-field elements
Column width	Fixed-field elements
Number of columns	Fixed-field elements
Space between components	Fixed-field elements Tag to indicators Indicator to indicator Indicator to subfield Subfield code to subfield data

To choose spacing options

1 In the Customize Editor, click the **Spacing** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

Horizon displays the Spacing tab of the Customize Editor:



2 Do one or more of these options:

Field	Action
Tag/Sub/Ind Label	Enter the number of characters that you want to use to display labels for tags, indicators, and subfields that identify components in the Labeled and Labeled Vertical views. If the label is longer than the spacing that you choose, Horizon truncates the label.
Label Width	Enter the number of characters that you want to use to display the fixed-field labels in the Expanded view. If the label is longer than the spacing that you choose, Horizon truncates the label.
Columns	Enter the number of columns that you want to use to display the fixed fields in the Expanded view.
Column Spacing	Enter the number of spaces that you want between fixed field columns. Spacing is measured from the longest string of text in the first column to the beginning of the label in the next column of the Expanded view.
Tag to Indicators	Enter the number of spaces that you want between the tag names and first indicators.

Field	Action
Indicator to Indicator	Enter the number of spaces that you want between indicators.
Indicator to Subfield	Enter the number of spaces that you want between an indicator and the first subfield.
Subfield Code to Data	Enter the number of spaces that you want between a subfield code and its data.

3 Click **OK** to save your changes.

Customizing Keyboard Shortcuts

You can use keyboard shortcuts to access many of the MARC Editor functions. (For example, **CTRL+C** copies highlighted text to the clipboard so that you can paste the text somewhere else.) On the Keyboard tab, you can display a list of editable shortcuts that you can use to access the MARC Editor functions.

You can edit the keystrokes that make up the shortcuts. However, you cannot edit the names of the editor functions that the shortcuts access.

You can also add shortcuts that let you access functions from the navigation bar. (For more information, see "Setting Up Shortcut Keys to Open Processes" in the "Customizing the Navigation Bar" chapter of the *Launcher Configuration Guide*.)

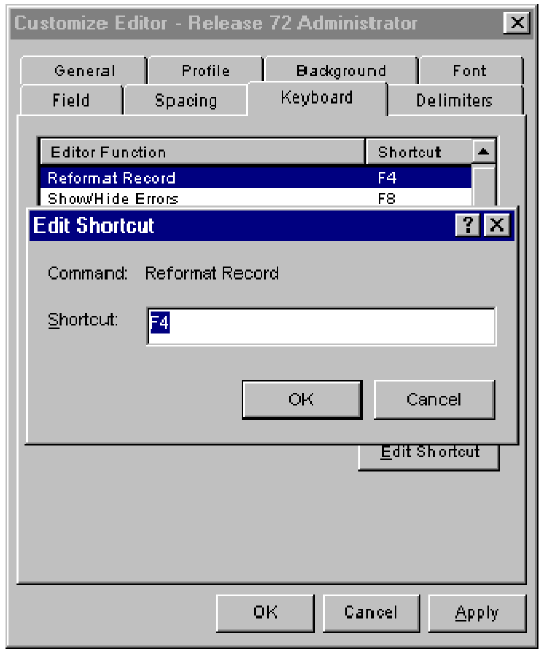
To edit shortcuts

1 In the Customize Editor, click the **Keyboard** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

2 Highlight the function that you want to edit.

3 Click the **Edit Shortcut** button.

Here is the Edit Shortcut window with Reformat Record selected for edit:



4 In the **Shortcut** field, enter the shortcut keystrokes that you want to use.

If you want to use a combination of keystrokes, you need to keep all keys pressed until the entire shortcut displays.

To eliminate the shortcut, press the **BACKSPACE** key.

5 If you choose keystrokes that are already assigned, Horizon displays a message telling you to make another selection.

6 Click **OK** to save your changes.

7 Repeat steps 2 through 6 for all the shortcuts that you want to customize.

Changing Delimiters

In MARC records, subfields are separated by subfield delimiters. The default subfield delimiter in Horizon is the double dagger (‡).

Nonsorting and sorting-only delimiters impact the way records are sorted in PAC and staff searching. (For example, you can use a nonsorting delimiter around the “a” in MacDuff so that Horizon sorts “MacDuff” with McCoy, McFadden, and so forth.) You can use a sorting-only delimiter to help Horizon sort by text instead of numerals. (For example, for the number “8,” you can enter the word “eight” inside these delimiters so that Horizon will sort alphabetically by the word, but still display the number.) (For instructions on how to use nonsorting and sorting-only delimiters, see **Editing Text to Control the Sort Order of Records** on page 68.)

Embedded ALA delimiters let you enter codes that let Horizon display special characters. (For example, the ALA hex set code for the digraph “ae” is B5. You put the delimiters on either side of the code to make “ae” display in a record.) (For more information about ALA hex set codes, see **Entering Special Characters** on page 69.)

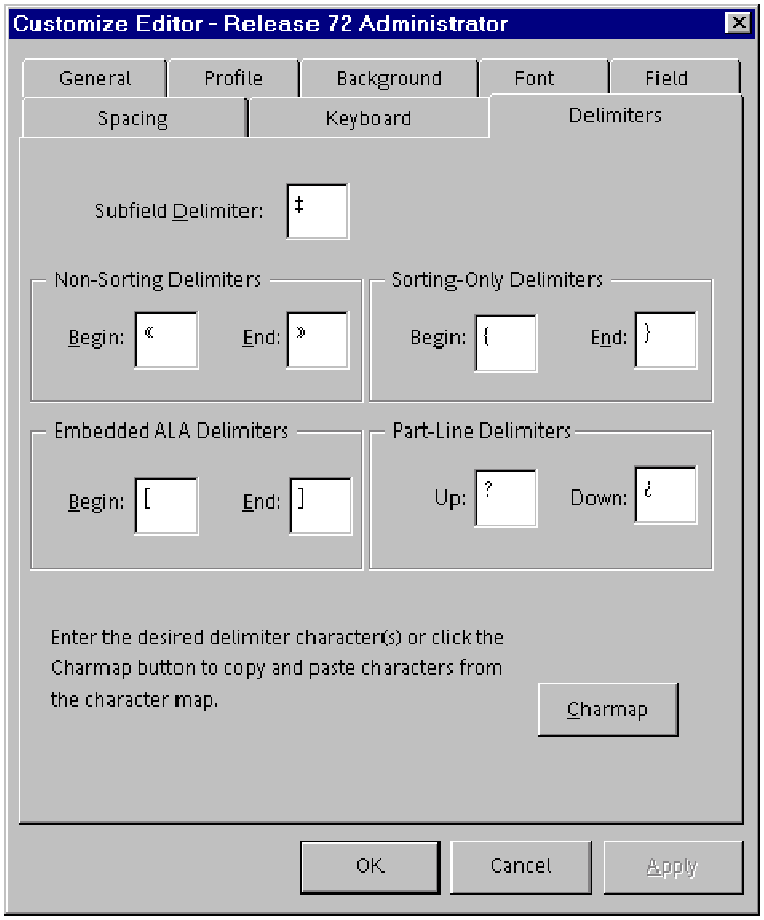
The Delimiters tab lets you change these delimiters that you use during cataloging:

- **Subfield delimiter**. This marks the beginning of a subfield.
- **Nonsorting delimiters**. These separate a character or word from the rest of the text so that it is not used for sorting.
- **Sorting-only delimiters**. These enclose a character or group of characters that you want to include for sorting, but which you do not want displayed.
- **Embedded ALA delimiters**. These enclose the code that creates an ALA hex set character.
- **Part-Line delimiters.** These are used in UNIMARC standard cataloging to identify super- and subscript characters.

To change delimiters

1 In the Customize Editor, click the **Delimiters** tab. (For instructions, see **Opening the Customize Editor** on page 13.)

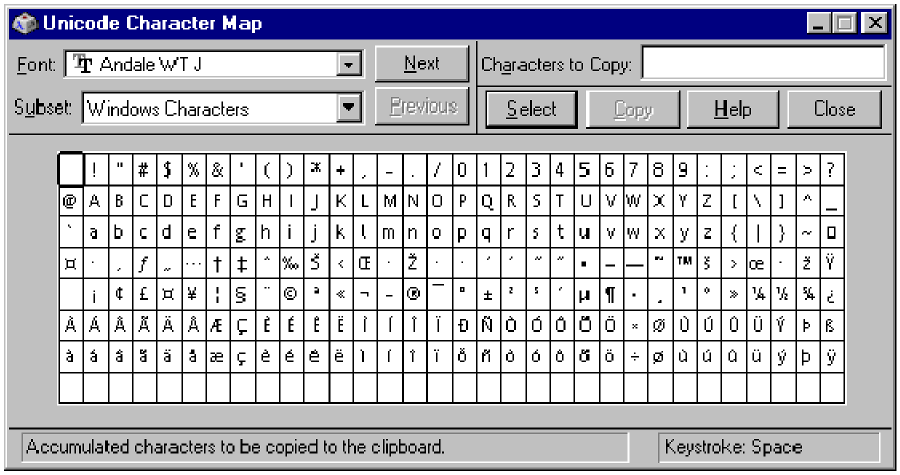
Horizon displays the Delimiters tab of the Customize Editor:



2 Do one of these options:

- In each field that has a delimiter that you want to change, enter the keyboard character that you want to use as a delimiter, then skip to step 10.
- If the character that you want to use as a delimiter is not on the keyboard, click **Charmap**.

Horizon displays the Unicode Character Map dialog box:



3 Choose the font that you want from the drop-down menu in the **Font** field.

SirsiDynix recommends that you use a Unicode-compatible font to display text and symbols clearly.

Note: Characters in a font other than the font you are using in Horizon may not display correctly.

4 Choose the set of characters that you want from the **Subset** drop-down menu.

You can click **Next** or **Previous** to display the sets of characters in the **Subset** field.

5 Click the character that you want on the Unicode Character Map.

6 Click **Select**.

7 Click **Copy**.

8 Click the **Close** button on the Unicode Character Map.

9 Highlight the delimiter that you want to change on the Delimiters tab.

10 Do one of these options:

- Press **CTRL+V**.
- Right-click and choose **Paste**. (You cannot use the Edit menu to paste.)

11 Click **OK** to save your changes.

12 Repeat steps 2 through 11 for all other delimiters that you want to edit.

Chapter 3: MARC Editing

This chapter explains how to work with MARC records in Horizon's MARC Editor.

This chapter contains these sections:

About MARC Editing

MARC records make it possible for a computer to read and display data about items you have in your library collection. Creating or editing a MARC record requires that you understand the components of a MARC record. Once you do, you can use Horizon's MARC Editor just like a word processor to change the text or delimiters that make up a MARC record.

This chapter includes general information about how you use Horizon MARC records. More specific information is given in later chapters, depending on the kind of record that you are working with. (For example, you find information about MARC authority records in the **Authority Records** chapter.)

About MARC Records

A Machine-Readable Cataloging record, or MARC record, contains electronic data that identify items held in your library. The data also classify the information the items contain. A MARC record includes the same information as a set of catalog cards.

Each MARC record is divided into sections called fields, which contain subfields. Each field is identified by a tag. Many fields are further identified by indicators. Tags identify information in fields, telling the computer what kind of data will follow. The information in fields includes such items as titles, ISSNs, notes, and subjects. Identifying tag numbers tell the computer what kind of information is recorded there and let the fields vary in length. (For example, you could have a one-word title such as

Roots or a longer title such as *Custer Died for Your Sins* in the same field category and the computer would still interpret the line correctly.) You can add, edit, and delete fields and subfields to customize each MARC record so that it will accurately represent items in your database.

This section explains these topics:

Understanding Tags and Fields

A field contains a piece of data that makes up a portion of a MARC record. A tag is a three-digit number that identifies the type of information in its corresponding field. (For example, tag 245 identifies the main title information; tag 020 identifies the ISBN number.) MARC rules define what information a tag identifies. Most tags that contain the digit “9” designate local or customized information. The term “tag” is sometimes used to designate an entire piece of information, including the three-digit number, the indicator, and all the subfields.

Horizon provides a defined list of MARC tags. When you want to add a tag to a record, you can open the list to choose a valid tag. You can also add a tag by opening a new line and entering the tag number manually. (For more information, see **Adding a Component to a MARC Record** on page 48.)

You can use **SHIFT+F1** from a valid MARC tag or subfield to link directly to the Library of Congress web site where that tag is explained. Your system administrator can change the link so that it finds a different URL. (For instructions, see “Setting Up or Changing Valid MARC Record Components” in the *Cataloging Setup Guide*.)

A MARC record contains these types of fields:

- **Fixed Fields**. Fixed fields are often called control fields. They are divided into positions. Each position contains information about the record in abbreviated form. The information in a fixed field can fill only the predefined length of the field. Fixed field positions have a valid set of values or codes defined by MARC standards.

Use caution when editing fixed fields. Most information is specific as set by MARC standards. Anything you change or delete should conform to the applicable standards.

- **Variable Fields**. Variable fields can contain varied lengths of information, as specified by the MARC cataloging rules that your library follows.

  Variable fields can be linking or nonlinking:

- **Linking fields.** These fields include authority-controlled, bib-to-bib, URL, multimedia, and other linking fields. The authority-controlled fields contain information from the authority record (author, subject, or series) to which the bib record is attached. (For example, tag 100 is an authority-controlled tag that displays the main author.) Other linking fields contain information that relates to the item (such as a URL, electronic data, or a sound file) that the field links to.
- **Nonlinking fields.** These fields contain information about the bib record that is not from another record or associated with another item. (For example, tag 245 is a nonauthority-controlled tag that displays the title.)

You can have these kinds of variable fields:

Type of variable field	What the field displays
Authority-controlled linking	Information about an author, subject, or series title that Horizon has stored in a separate “authority” record Bib records link to the authority record to get uniform information for these fields.
Authority-controlled nonlinking	Information about an author, subject, or series title that should be uniform, but from which Horizon does not link to an authority record The data should be reviewed to find a link or create a new authority record from it.
Nonauthority-controlled linking	Information other than an author, subject, or series title, but that links to something such as another bib record, a URL, or an electronic document
Nonauthority-controlled nonlinking	Information other than an author, subject, or series title that does not link to anything else

Understanding Indicators

An indicator is one of two character positions that follow a tag number. Each position is one character long and consists of an underscore or blank (for undefined) or a digit from 0 to 9. The meaning of each indicator varies from tag to tag and is defined by MARC standards.

You can edit an indicator directly in the MARC record.

Most indicators contain information that describe the tag. (For example, the first indicator of a 110 corporate name tag indicates whether the name is inverted or in direct order.) You may have fields that use both indicators, neither indicator, or only the first or only the second indicator. When an indicator is not used, it is an “undefined” indicator and is left blank.

Some indicators can determine nonfiling characters. These indicators determine how many leading characters Horizon ignores when it creates a list that you can browse alphabetically.

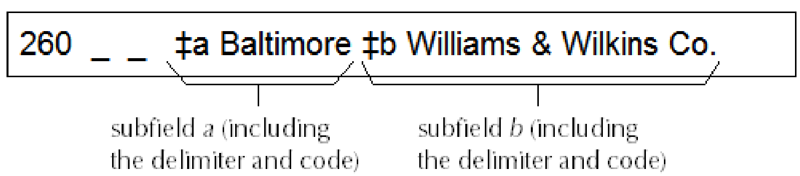
For example, the title *The one and only* has a nonfiling indicator of “4.” Horizon ignores the first four characters (the space after “The” counts as a character) and files the title using “One” in an alphabetical list.

If a nonfiling indicator is left blank, Horizon checks the article table when saving the record to see if it can enter an indicator for you. (For more information, see “Initial Articles” in the “Searching Setup” chapter of the *System Administration Guide*.)

Understanding Subfields

A subfield contains information within a field. Each subfield starts with a delimiter and is labeled with either a letter or number, called a subfield code. You can edit the subfield code without changing the information in the subfield. You can also change the information.

For example, in this MARC 21 publication tag (260), the two subfields have the codes *a* and *b*, respectively:



Subfields may or may not display in a tag in alphabetical order; order is determined by standard cataloging rules. Also, some subfield codes may be repeated (duplicated) within a tag.

Horizon provides a defined list of MARC subfields. When you want to add a subfield to a field, you can open the list to choose a valid subfield. You can also add a subfield by entering the subfield code manually. (For more information, see **Adding a Subfield to a Tag** on page 62.)

To edit a subfield in an authority-controlled tag, you can edit the corresponding authority record for that tag, or you can edit the subfield in the bib record.

If you edit an authority-controlled subfield in the bib record, Horizon breaks the link and you may affect the authority record. Any further linking of that edited information is based on the link settings. (For more information, see **Linking Authority-Controlled Records to Bib Records** on page 57.)

Understanding Validity and Repeatability of Tags, Indicators, and Subfields

When you try to add a tag, indicator, or subfield to a record, Horizon verifies that the tag is valid for that record or that the indicator or subfield is valid for that tag, according to MARC standards as your system administrator has defined them for your database. Horizon also checks to see if the tag or subfield is repeatable according to your library’s defined MARC standards. (Repeatable fields or subfields can be added multiple times to a record.)

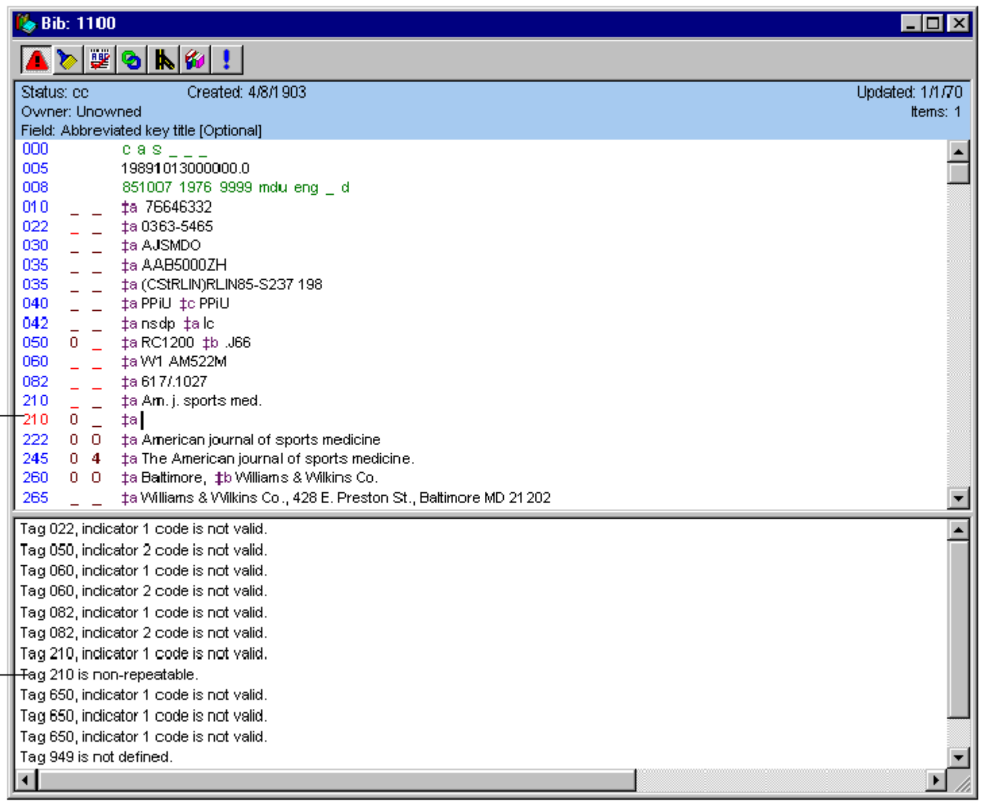
If you add a tag, indicator, or subfield that is not valid or repeatable, and if you have activated Error Checking, Horizon displays a message in the error window telling you that the tag, indicator, or subfield is not valid or is nonrepeatable. Horizon may also display the erroneous information in a different color, depending on your field settings. (For more information, see **Choosing Field Options** on page 30 and **Activating Error Checking in Records** on page 22.)

Some invalid or nonrepeatable tags or subfields may be identified as “Fatal.” You cannot save a record if it contains a tag or subfield that violates the terms of its fatal status. (For more information, see “Setting Up or Changing Valid MARC Record Components” in the *Cataloging Setup Guide*.)

Here is an example of an error message:

A nonrepeatable 210 tag already exists in the record, so the second 210 tag is an error.

The error message for the extra 210 tag displays in the error window along with any other MARC errors in your record.



If you double-click an error description in the error window, Horizon moves your insertion pointer to the error in the edit window.

Opening a MARC Record

The fields of a MARC record hold all the information about an item in a format that both you and your computer can understand. Before you can make changes to a MARC record, you must open or create one.

This section explains these topics:

- **Creating a New MARC Record** on page 45
- **Opening an Existing MARC Record** on page 45

Creating a New MARC Record

To open a new bib or authority record, you create one from a workform. (A workform is a template used to make MARC records.) A workform includes certain fields to help remind you what information the record for a particular type of item needs. (For more information on workforms, see Chapter: Chapter 7, "Workforms" on page 214.)

To create a new MARC record

1 In Horizon, do one of these options:

To create an authority record	To create a bib record
Start the **Create New Auth** process. The default location of this process is the **Cataloging\ Authority Record** folder on the navigation bar.	Start the **Create New Bib** process. The default location of this process is the **Cataloging\ Bibliographic Record** folder on the navigation bar.

2 Choose the workform that you want to use to create the new MARC record.

3 Click **OK**.

Horizon opens the workform that you chose.

Opening an Existing MARC Record

Before you can edit an existing MARC record, you must find it in your database and open it.

To open an existing MARC record

In Horizon, do one of these options:

- Find an existing bib record:

<table>
<tr><th>Using staff searching</th><th>Using a number</th></tr>
<tr><td>1. Start a New Search.
To do this, press F2, or find the process in the Searching folder on the navigation bar.
2. Search for the title that you want to view.
Proceed with the search until the system displays either a Titles list window or a Bibliographic Detail window.
3. Highlight the title that you want.
If you highlight more than one title, Horizon sends a bib record for each highlighted title to the MARC Editor.
4. Press F10 or choose Edit, Send to.
Horizon opens the Send To dialog box.
5. Double-click MARC Editor.
Horizon opens the bib record that you chose.</td><td>1. Start the Bib Quick Search process.
The default location of this process is the Cataloging\ Bibliographic Record folder on the navigation bar.
2. Highlight the index that you want to use.
3. Enter the appropriate number in the Search for field.
4. Click OK.
Horizon opens the bib record associated with the number that you entered.</td></tr>
</table>

- Find the authority record (author, series, or subject) that you want to open:

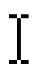
<table>
<tr><th>Using staff searching</th><th>Using a number</th><th>Using a bib record</th></tr>
<tr><td>1. Start a New Search.
To do this, press F2, or find the process in the Searching folder on the navigation bar.
2. Choose an index that searches for the kind of authority (author, series, or subject) record that you want to open.
3. Search for the authority whose record you want to view.
4. Highlight the authority that you want.
If you highlight more than one authority, Horizon sends a record for each highlighted authority to the MARC Editor.
5. Press F10 or choose Edit, Send to.
Horizon opens the Send To dialog box.
6. Double-click MARC Editor.
Horizon opens the records for the authorities you chose.</td><td>1. Start the Auth# Lookup process.
The default location of this process is the Cataloging\Authority Record folder on the navigation bar.
2. Enter the number of the authority in the Record Key field.
3. Click Edit.
Horizon opens the authority record.</td><td>1. Open an existing bib record that contains a link to the authority record that you want to open. (For instructions, see Opening an Existing MARC Record on page 45.)
2. Double-click the authority tag whose record you want to view.
Horizon opens the authority record.</td></tr>
</table>

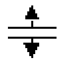
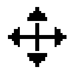
Navigating in a MARC Record

You can use either the mouse or the keyboard to move from field to field in a MARC record. Click the left mouse button when the pointer is in the field that you want to move to, or use these keyboard commands:

- Press **TAB** to move to the next field.
- Press **SHIFT+TAB** to move to the previous field.
- Press the down arrow (↓) to move to the next line.
- Press the up arrow ( ) to move to the previous line.
- Press **HOME** to move to the beginning of the line.
- Press **CTRL+HOME** to move to the beginning of the record.
- Press **END** to move to the end of the tag (if the information in the tag wraps to the second line, **END** moves you to the end of that second line).
- Press **CTRL+END** to move to the end of the record.

As you move the mouse pointer across your screen when a record is open, the pointer changes shape. These shapes indicate the action possible or the type of information present where the pointer is positioned:

Pointer shape	Description
	**Text Select Pointer**. When Horizon displays this pointer, position it over the place that you want to edit, then click the mouse so the pointer inserts a flashing insertion pointer, or drag the pointer to select text.
	Insertion Marker. When you click the pointer, an insertion marker displays to indicate where your typing or pasting will show in the current layout.
	**Alternate Select Pointer**. The pointer is positioned over a link. You can double-click to open the linked record or URL. You can click once to edit the text in the link for this bib record only. **Note:** When you edit a linked subfield, Horizon breaks the link and you may affect the authority record. Any further linking of that edited information is based on the link settings. (For more information, see **Linking Authority-Controlled Records to Bib Records** on page 57.)
	**Normal Select Pointer**. This pointer is usually active anywhere except over a record in the Horizon workspace. If you have a pop-up menu active (such as when you right-click in a record), this pointer is active even over the record.

Pointer shape	Description
	**Resize Pointer**. This pointer lets you change the size of a divided or split window, such as between the MARC Editor and the error window.
	**Move Pointer**. This pointer becomes active when you move your mouse pointer over selected text. When this pointer is active, you can drag selected text to a new location. This moves the selected text; it does not copy the text. (You can move only a copy of the selected text by holding the **CTRL** key while you drag the selected text.)

Using Catalog Context Links

While creating or editing bibliographic or authority records, you can be taken to an external site, which provides contextual help for MARC tags.

To open contextual MARC tag help

1. Place the cursor over the MARC tag you want to look up.
2. Right-click to open the shortcut menu, and then click either Library of Congress, RDA Toolkit, or a custom link that is set by the system administrator.

Adding a Component to a MARC Record

You add tags and subfields to a MARC record when you want to add information to that record. If you add a tag or subfield that is not already defined by your system administrator, the MARC Editor lets you put it in, but marks it as an error. If you have activated Error Checking, the error displays with the font or color settings determined in the Customize Editor. (For more information, see **Activating Error Checking in Records** on page 22.) You can add non-linking and linking tags and subfields.

When you have your insertion pointer in a component marker (such as a tag, indicator, or subfield delimiter) or in any other component that has valid values defined, you can press **F12** for a list of valid codes. Double-clicking on the code that you want inserts it into the proper position. (Horizon notifies you if no valid codes are available.)

This section explains these topics:

- **Adding a Non-Linking Tag to a Record** on page 49
- **Adding a Link Tag to a Bib Record** on page 50
- **Adding a Subfield to a Tag** on page 62

Adding a Non-Linking Tag to a Record

You can add a non-linking tag anywhere in a MARC record. When you save or reformat the record, the MARC Editor reorders the tags, depending on the sort tag action that your system administrator has chosen. (For more information on sort tag action, see “Setting Up or Changing General Cataloging Type Parameters” in the “Setting Up or Changing Valid MARC Record Components” section of the *Cataloging Setup Guide*. For more information on reformatting, see **Editing Components of a MARC Record** on page 65.) If you want to position the tag in a particular place you can cut and paste the tag. (For instructions, see **Cutting, Copying, Pasting, and Deleting Information in a MARC Record** on page 65.)

To add a non-linking tag to a record

1 Open a MARC record.

2 Do one of these options:

- Click your pointer anywhere in the record.
- If you want to position the new tag, click your pointer in the tag just above where you want the new tag to display.

Note: Your library’s settings for tag sorting may affect your new tag’s final position in the record.

3 Do one of these options:

- If you want to choose a tag from a list, do these steps:
  - Choose **Edit, Add Tag**, or right-click in the record and click **Add Tag** on the pop-up menu.

    Horizon opens the Select Tags to Add window.
  - Double-click the tag that you want to add.

    If you want Horizon to find the tag in the list, begin typing the number of the tag you want.

    Horizon inserts the tag and some valid subfields on the line below your insertion pointer.
- If you want to add a blank tag, do these steps:
  - Choose **Edit, Insert Tag**, or right-click in the record and click **Insert Tag** on the pop-up menu.

    Horizon inserts a blank tag just below your insertion pointer. The blank tag displays an underscore three characters wide to designate where you put the tag number and two underscores to designate the tag indicators.
  - Enter the tag number.

    Horizon inserts some valid subfields. (For more information, see **Editing Components of a MARC Record** on page 65 and **Adding a Subfield to a Tag** on page 62.)

4 Add subfields as needed. (For instructions, see **Adding a Subfield to a Tag** on page 62.)

Adding a Link Tag to a Bib Record

You can add several different kinds of link tags to a bib record. These tags link from the bib record to another source of information.

You can add authority-controlled tags that define authorities (author, series, subject). These tags link to authority records, which keep information uniform when it is repeated in multiple bib records. If you need to, you can change the default authority link type.

You can add link tags that let users view images, full text, animation, sound, or other electronic documents. All users can view these items by double-clicking on a line of the full bib display in PAC. Catalogers can view these items by double-clicking on the link in the bib record. These tags can link to Internet sites or to electronic files in your library.

You can add tags that link bib records to other bib records, such as for books in a series. (For more information, see **Working with Linked Bib Records** on page 99.) You can also add tags that link authority records to other authority records. (For more information, see **Creating a Cross-Reference** on page 124.)

This section explains these topics:

Adding an Authority-Controlled Tag

Authority-controlled tags in bib records contain information from authority records. Many bib records can link to one authority record. This allows the information in authority-controlled tags to be consistent for all bib records that link to the same authority record. It also maintains consistency in the use of authors' names, series names, and subjects. When authority tags remain consistent in your database, borrowers can more easily find the information that they need.

You can choose the type of link that Horizon uses when it links bib and authority records. Depending on the type of link, Horizon does one of these things:

If you choose this	Horizon does this
Always Link	Links the bib record to an existing authority record in your database or creates a new authority record when you save the record if one does not exist
Link On Match	Links the bib record to an existing authority record in your database or waits until you create a matching authority record to link
Never Link	Does not link the bib record to an authority record

You change the default authority link type on the General tab of the Customize Editor. (For instructions, see **Choosing the Default Authority Link Type** on page 20.) When you change the default, the new setting applies to any authority-controlled tags added to bib records after you make the change. Any tag already created retains the linking type with which it was created.

Horizon defines any link tags that were created before Horizon version 7.0 and that have not been modified since their creation with a link type of "unknown."

You can also override the link type setting for individual authority tags within any bib record. (For instructions, see **Changing the Authority Link Type for an Individual Tag** on page 53.)

Since authority-controlled tags follow a certain format and contain specific information, you should try to link to an existing authority in your database before you create a new one. If Horizon does not create automatic links, you can search for a tag from an existing heading and, if you find one that you want, you can send it to the MARC Editor and link it to the bib record.

You can also use Browse Link to create a link with an existing authority. Browse Link gives you a fast access to authority records in your database by working with search types that your system administrator sets up. Before you can use this feature, you need to choose a Browse Link search flavor in the Profile tab of the Customize Editor after your system administrator creates them. (For more information, see "Setting Up Browse Link" in the *Cataloging Setup Guide* and **Setting a Browse Link Flavor** on page 24.)

You can link multiple records to one record at the same time. You can also link multiple records to multiple records. (For instructions, see **Linking Authority-Controlled Records to Bib Records** on page 57.)

To add an authority-controlled tag

1. Open a bib record.
2. Do one of these options:
   - Click your pointer anywhere in the record.

- If you want to position the new tag, click your pointer in the tag just above where you want the new tag to display.

Note: Your library's settings for tag sorting may affect your new tag's final position in the record.

3 Do one of these options:

- If you want to choose a tag from a list, do these steps:
  - Choose **Edit, Add Tag**, or right-click in the record and click **Add Tag** on the pop-up menu.

    Horizon opens the Select Tags to Add window.
  - Double-click the tag that you want to add.

    Horizon inserts the tag and some valid subfields on the line below your insertion pointer.
- If you want to add a blank tag, do these steps:
  - Choose **Edit, Insert Tag**, or right-click in the record and click **Insert Tag** on the pop-up menu.

    Horizon inserts a blank tag just below your insertion pointer. The blank tag displays an underscore three characters wide to designate where you put the tag number and two underscores to designate the tag indicators.
  - Enter the tag number.

    Horizon inserts some valid subfields. (For more information, see **Editing Components of a MARC Record** on page 65 and **Adding a Subfield to a Tag** on page 62.)

4 Add subfields as needed. (For instructions, see **Adding a Subfield to a Tag** on page 62.)

5 To check for an existing authority record, do one of these options:

If you have Browse Link set up	If you do *not* have Browse Link set up
1. Put your insertion pointer in the subfield where you want to create the link. 2. Begin entering the text that you want to use. 3. Choose **Edit, Link Options, Browse Link**. Horizon opens a search results window displaying headings that begin with the same text that you entered in the subfield from which you started the search. You can click **Show Titles** to see a list of titles associated with the entry. 4. Continue with step 6 of this task.	1. Search for the authority you want to use. 2. Do one of these options: • If you find the authority, send it to the MARC Editor and link it to the bib record. (For instructions, see **Linking Authority-Controlled Records to Bib Records** on page 57.) • If you do *not* find the authority, return to the MARC Editor and create a new authority. (For instructions, see **Creating an Authority Record** on page 116.) The task is finished.

If you use browse linking in the MARC Editor, Horizon treats French articles, such as Le and La, that are part of people's names, like articles. As a result, if you are searching for an author, such as Le Carré, Horizon displays authors that start with the letter "C" instead of displaying authors that start with the letter "L".

Horizon is designed to use all articles stored in the article table in all searches. However, Horizon does provide the article_exception table for you to enter articles you want Searching to ignore. In the case of Le Carré, you must enter the entire name "Le Carré" (including the diacritic) as an entry in the article_exception table in order for Horizon to display authors that start with the letter "L" rather than "C."

For more information on the article_exception table, see "Initial Articles" in the *System Administration Guide*.

6 Do one of these options:

- If you find the authority, do these steps:
  - Highlight the authority heading that you want.
  - Click **Link**.

    Horizon completes the link between the authority heading and the bib record and enters the appropriate information in the tag or subfield from which you started the search.
- If you do *not* find the authority, do these steps:
  - Click **Cancel** to close the Subjects window.
  - Enter the information in the tag for the new authority record you are about to create.
  - Do one of these options:
    - If the tag link type is Always Link, move the pointer out of the field.
    - If the tag link type is *not* Always Link, change the link type. (For instructions, see **Changing the Authority Link Type for an Individual Tag** on page 53.)
    - If the tag link type is *not* Always Link and you know you want to create a new record, choose **Edit, Link Options, Link Tag, Create New Record**.

    Horizon creates an authority-controlled tag for the new authority heading, links the records, and shows the link in the bib record by changing the font attributes to match your settings for linked text.

Changing the Authority Link Type for an Individual Tag

You set the default authority link type in the Customize Editor. You can override the default link type for a single tag when you add a new authority tag. You can also override the link type setting for a single existing authority tag. (For example, if an existing tag is unlinked, you can change it to link the next time you save the record.)

If you find that you override the default frequently, you can change the default. The new default applies to any authority-controlled tags added to bib records after you change the default setting. Any tag already created retains the linking type with which it was created. (For instructions, see **Choosing the Default Authority Link Type** on page 20.)

Your system administrator determines which staff members can link tags to authority records.

To change the authority link type for an individual tag

1 Open a bib record.

2 Put your insertion pointer in the tag for which you want to change the link type.

3 Choose **Edit, Link Options, Authority Link Type**.

4 Choose the link type that you want from the drop-down list.

Horizon creates the link that you specify:

If you change from this	To this	Horizon does this
Always Link	Link On Match	No change
Always Link	Never Link	Unlinks the tag immediately
Link On Match	Always Link	If the tag is linked, Horizon leaves it linked. If the tag is not linked, Horizon links the tag when you save the record.
Link On Match	Never Link	If the tag is linked already, Horizon unlinks the tag immediately. If the tag is not linked, Horizon leaves the tag unlinked.
Never Link	Always Link	Links the tag when you save the record
Never Link	Link On Match	Links the tag if Horizon finds a match. If Horizon does *not* find a match, Horizon links the tag when you create an authority record to match.

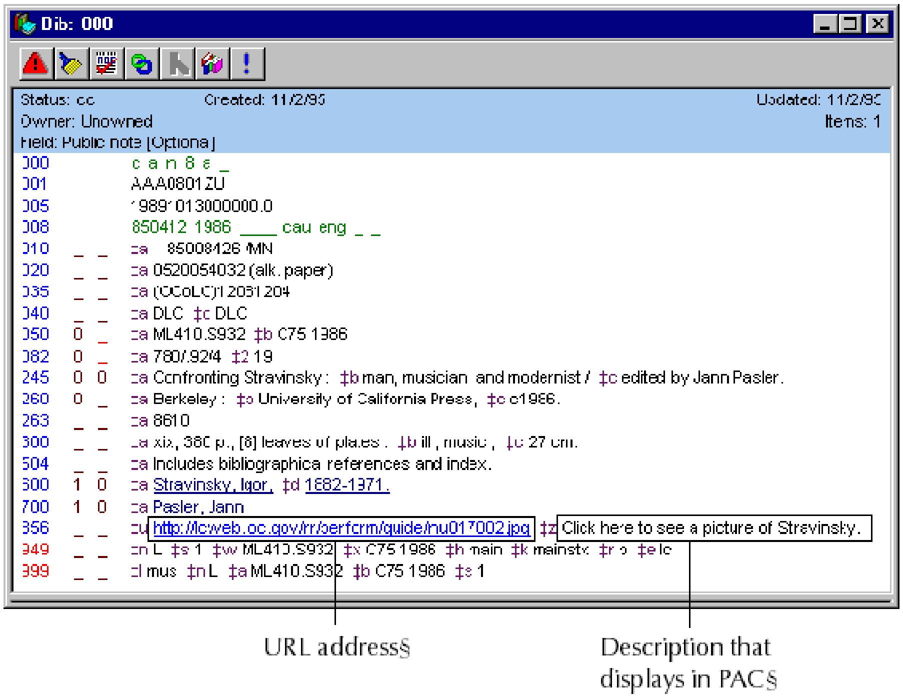
5 Save your changes.

Creating a Link to an Internet Location

You can display multimedia files from the Internet in PAC and from a bib record by creating a link to an Internet address. (For example, you can display a text file, a sound file, a bitmap image, or a web page.) The Library of Congress specifies the 856 tag (Electronic Location and Access) as the one to contain information such as the URL

(Uniform Resource Locator) and the description; however, Horizon recognizes several prefixes (such as http, ftp, and www) and automatically creates links for them when you add them in any subfield. The computer running PAC must have access to the Internet to enable the connection.

Here is an example of an 856 tag that references a graphic file on the Internet:



To create a link to an Internet location with an 856 tag

1 Open a MARC record.

2 Add the 856 tag. (For instructions, see **Adding a Component to a MARC Record** on page 48.)

3 Enter the URL, including its appropriate prefix, in subfield *u*.

Horizon displays the link as specified for linked field data.

4 If you want a description of the link to display in PAC, enter the description in subfield *z*.

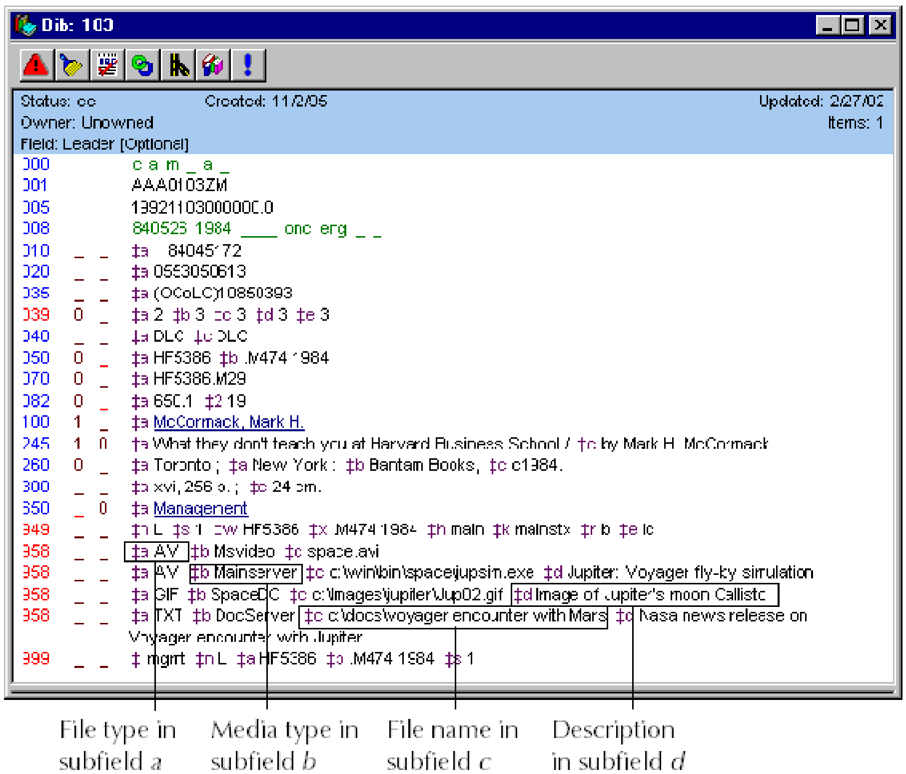
5 Save your changes.

Creating a Link to a Stored Multimedia File with a 958 Tag

You can display stored multimedia files in PAC and from a bib record by creating a link to a multimedia file using a 958 tag. (For example, after a user conducts a keyword search for “mona lisa,” you can have PAC display a full bib record describing the painting. To view an image of the painting, the user double-clicks on the line of the full bib that says “Document scanned image of Mona Lisa.”)

The 958 tag contains information such as the document type, media type, document file name, and description. The multimedia files must be stored on a drive accessible to the computer that runs PAC.

Here is an example of a bib record with several 958 tags referencing multimedia files:



To create a link to a stored multimedia file with a 958 tag

1 Open a MARC record.

2 Add a 958 tag to the bib record.

Your system administrator may need to add this tag with subfields *a*, *b*, *c*, and *d* to your system.

(For instructions, see “Setting Up or Changing Valid MARC Record Components” in the *Cataloging Setup Guide*.)

3 Enter the document type in subfield *a*.

The document type is a library-defined code. It defines the type of attached file. Some file types include:

- GIF image files
- TIFF image files
- WAV sound files

4 Enter the medium name in subfield *b*.

This connects the logical name of the medium where the attached document is stored to a physical driver on the user's workstation. (For information about available media names, see your system administrator.)

5 Enter the document's full path file name, including the drive specification, in subfield *c*.

This is the name of the file that contains the media document.

6 Enter a description of the media file to be heard or seen in subfield *d*.

This is the description that displays in PAC.

7 Save your changes.

Linking Authority-Controlled Records to Bib Records

You can link one or more authority records to one or more bib records. If you have chosen an authority link type of Always Link or Link On Match (and Horizon finds a match in your database), Horizon does one-to-one record matching automatically. If you have chosen an authority link type of Never Link or Link On Match (and Horizon does not find a match), you can link one-to-one by changing the link type. (For instructions, see **Changing the Authority Link Type for an Individual Tag** on page 53.) You can also link one-to-one, one-to-many, or many-to-many manually.

This section explains these topics:

- **Linking Authority-Controlled Records to Bib Records** on page 57
- **Linking One or More Authority Records to One or More Bib Records** on page 58

Linking a Single Authority Record to a Single Bib Record

You can link one authority record to one bib record if you open in the MARC Editor only the two records that you want to link.

If you have multiple records of either type open and want to do a one-to-one linkage, do the steps for linking multiple records and choose a single record from both the "from" and the "to" columns. (For instructions, see **Linking One or More Authority Records to One or More Bib Records** on page 58.)

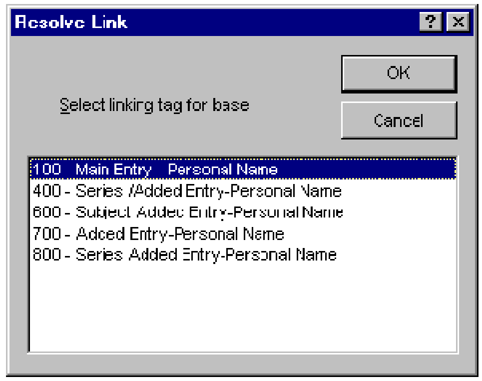
To link a single authority record to a single bib record

1 Open a bib record to which you want to attach an authority record.

2 Open an authority record that you want to attach to the bib record.

3 Choose **Marc, Link Record**, or click the **Link** icon ( ) in the toolbar.

Horizon opens the Resolve Link dialog box:



4 If necessary, double-click the type of tag that you want to use as the authority tag designation.

Note: If a tag that you are trying to attach already exists in the bib record as a nonrepeatable tag, Horizon does not attach the tag. Instead, Horizon displays a tag message that explains why the tag cannot be attached.

Note: If the use code of the authority record does not match the type of tag you chose, Horizon asks you to confirm a change in the use code. (A use code indicates whether the authority record is valid for use as a certain authority type.)

5 Save your changes.

Horizon inserts the new authority tag and its text in the correct numeric order. You can cut and paste the new tag to move it to the position that you prefer, depending on how your tag action is set. (For instructions, see **Cutting, Copying, Pasting, and Deleting Information in a MARC Record** on page 65.)

Linking One or More Authority Records to One or More Bib Records

You can link one authority to one bib, many authorities to one bib, many bibs to one authority, or many authorities to many bibs.

Linking multiple records to multiple records can become complex. Make sure you understand what you are linking before you complete this task.

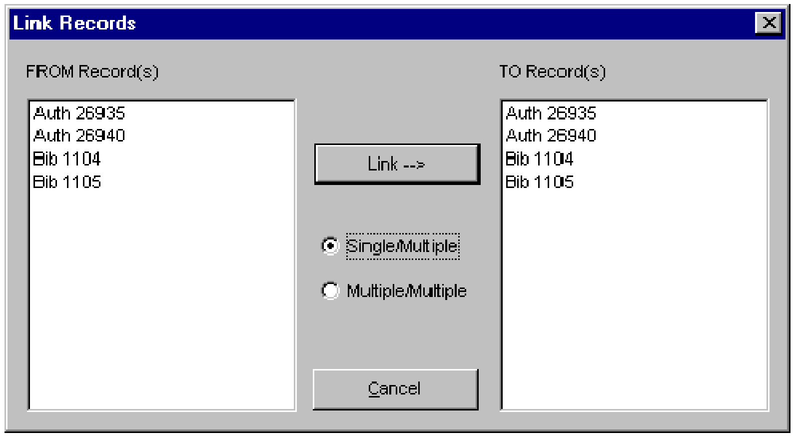
To link one or more authority records to one or more bib records

1 Open the bib records to which you want to attach authority records.

2 Open the authority records that you want to attach to the bib records.

3 Choose **Marc, Link Record**, or click the **Link** icon ( ) in the toolbar

Horizon opens the Link Record dialog box with all the open records displayed in both columns:

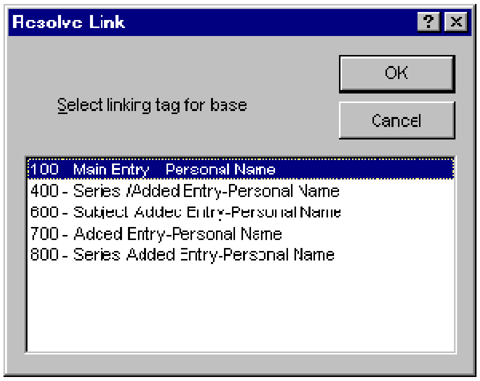


4 Do one of these options:

To do this	Do this
Link one bib to one authority	1. Mark **Single/Multiple**. 2. Highlight the bib record you want to link from in the **From Records** column. 3. Highlight the authority record you want to link to in the **To Records** column.
Link one bib to multiple authorities	1. Mark **Single/Multiple**. 2. In the **From Records** column, highlight the bib record number from which you want to link. 3. In the **To Records** column, highlight the authority record numbers to which you want to link. **Note:** When you mark Single/Multiple, Horizon lets you highlight multiple records in only one column.
Link one authority to multiple bibs	1. Mark **Single/Multiple**. 2. Highlight the bib record numbers you want to link from in the **From Records** column. 3. Highlight the authority record number you want to link to in the **To Records** column. **Note:** When you mark Single/Multiple, Horizon lets you highlight multiple records in only one column.
Link multiple authorities to multiple bibs	1. Mark **Multiple/Multiple**. 2. Highlight the bib record numbers you want to link from in the **From Records** column. 3. Highlight the authority record numbers you want to link to in the **To Records** column. **Note:** When you mark Multiple/Multiple, you can highlight multiple records in both columns.

5 Click **Link**.

If a tag can attach in more than one area (for example, the tag can attach as either a tag 651 or 691), Horizon opens the Resolve Link dialog box:



Note: If more than one linking record can have a tag attach in more than one area, Horizon displays the number of the record whose tag attachment you need to consider in the Resolve Link title bar.

6 If necessary, double-click the tag that you want to use as the authority tag designation.

Note: If a tag that you are trying to attach already exists in the bib record as a nonrepeatable tag, Horizon does not attach the tag. Instead, Horizon displays a message that explains why the tag cannot be attached.

7 Make sure that one of the bib records is the active window.

8 Save the bib record.

Horizon inserts the new authority tags in their correct numeric order into the active bib record. You can cut and paste the new tags to move them to a position that you prefer, depending on how your tag action is set. (For instructions, see **Cutting, Copying, Pasting, and Deleting Information in a MARC Record** on page 65.)

9 Activate and save each remaining bib record.

Breaking a Link Using the Unlink Command

You can break authority to bib links by changing the link type. You can break any kind of link by using the Unlink command.

To break a link using the Unlink command

1 Put your pointer in a linked tag.

2 Choose **Edit, Link Options, Unlink Tag**.

The link is broken and Horizon changes the link type to Never Link.

Troubleshooting Problems with Linking

When you try to link records, Horizon does not always complete the link. Linking occurs based on settings in the software or on your actions in the software. When linking does not occur, the software settings or actions on your part do not match the needed actions in Horizon.

To troubleshoot problems with linking, look in this table to find the type of problem that you encounter. Then do the steps to resolve the issue:

If the tag does not link because of this	Do this
The tag is not set up to link.	Set up the tag for linking. (For instructions, see "Setting Up or Changing Tag Linking" in the "Setting Up or Changing Valid MARC Record Components" section of the *Cataloging Setup Guide*.)
Automatic linking is not turned on.	Turn on automatic linking. (For instructions, see **Choosing Automatic Linking between Records** on page 19.)
The authority link type is Link On Match, and Horizon has no authority match for the bib record.	Create an authority record to match the bib record tag. (For instructions, see **Creating an Authority Record** on page 116.)
The authority link type is Never Link.	Change the link type to Always Link or Link On Match. (For instructions, see **Changing the Authority Link Type for an Individual Tag** on page 53 or **Choosing the Default Authority Link Type** on page 20.)
Automatic Linking is turned on but your insertion marker is still in the subfield.	Move your insertion marker to another tag.
Automatic Linking is turned off but you have not saved the record.	Save your changes.
Your security settings do not let you make these links.	See your system administrator.
You are using subfield *z* to match records but you have not chosen an import source.	Select an import source. (For instructions, see **Linking Bib Records by Using an Import Source** on page 103.)
Horizon is set to Link on Match and you have a typographic error.	Check your entry or browse for the record to which you want to link. (For instructions, see **Adding a Link Tag to a Bib Record** on page 50.)

Adding a Subfield to a Tag

Your system administrator usually sets up tags so that the most commonly used subfields for each tag display when you open a workform that has tags already added or when you add a valid tag to a MARC record. However, you can also add other subfields to tags in MARC records. If you have activated Error Checking, Horizon marks as an error any subfield that you add that is not appropriate for that tag. Horizon also marks as errors any duplicate subfields that are not repeatable.

(For more information on Error Checking, see **Activating Error Checking in Records** on page 22.)

To add a subfield to a tag

1 Open a MARC record.

2 Add a tag if necessary. (For instructions, see **Adding a Component to a MARC Record** on page 48.)

3 Put your insertion pointer next to an existing subfield code.

4 Do one of these options:

- If you want to choose a subfield from a list, do these steps:

  – Choose **Edit, Add Subfield**, or right-click in the record and click **Add Subfield** on the pop-up menu.

  Horizon opens the Select Subfields to Add window.

  – If you want Horizon to find the subfield in the list, type the letter of the subfield you want.

  – Double-click the subfield that you want to add.

  Horizon inserts the subfield at the end of the tag where your insertion pointer is.

- If you want to add a blank subfield, do these steps:

  – Choose **Edit, Insert Subfield**, or right-click in the record and click **Insert Subfield** on the pop-up menu.

  Horizon inserts a blank subfield at the insertion pointer. The blank subfield displays an underscore to designate where you enter the subfield code.

  – Enter an alphanumeric subfield code. (For more information, see **Editing Components of a MARC Record** on page 65.)

5 Enter the information that you want in the subfield.

6 Repeat steps See "Put your insertion pointer next to an existing subfield code." through See "Enter the information that you want in the subfield." for any other subfields that you want to add.

7 Save your changes.

Editing a MARC Record

Horizon offers several advanced editing options that affect the way all MARC records display. Your system administrator can set up Horizon to take advantage of these features:

- **Basing authority control on bib subfields.** This lets authority-controlled bib tags have different sets of controlled subfields. (For example, the bib tag 400 <subfield *v* can be set as *not* controlled, while the bib tag 600 subfield *v* can be set as controlled.) If you use this feature, *bib* subfield control values (rather than the subfields in the *authority* record) determine which bib subfields are controlled. Only linking bib subfields have to match the corresponding subfield in the authority record. This is especially useful if you want to have unique volume numbers on bib tags that are controlled by the same series authority.

  The new bib subfield control settings do not automatically affect all bib records. Once you have made the changes, if you add, modify, or overlay a record, Horizon applies the new settings. Previously existing records are modified if you open and resave them, or if you run BARelink. (For more information, see your system administrator.)

- **Ignoring ending punctuation from all linking bib subfields during authority matching**. This prevents Horizon from generating duplicate authority records when the ending punctuation on linking bib subfields is different from the ending punctuation in the corresponding subfield of the authority record.
- **Preserving original ending punctuation on linking bib subfields**. When you import bib records, Horizon may link a new bib record to an existing authority record that has different ending punctuation from the authority record being imported with the new bib record. Your system administrator can choose to preserve and display the original ending punctuation in the controlled bib subfields instead of replacing the bib subfields with the ending punctuation from the corresponding authority tag.
- **Preserving local authority subfields**. This feature lets you retain any information you have added or edited in local authority subfields (for example, subfield *w* on 4XX and 5XX tags) when you import and export MARC records. (Instructions contained within local authority subfields cannot yet be interpreted in PAC.)

Your library may have determined which of these advanced editing options to implement when you installed a previous version of Horizon (6.0 or later). (For more information, see your system administrator.)

Additionally, you can edit individual MARC records, including the header. The MARC Editor lets you edit most parts of a MARC record as if you were using a word processor. You can edit information in tags, indicators, and subfields. You can also move, copy, and paste information. Horizon lets you change anything in the records. However, if you have activated Error Checking and create an invalid tag, subfield code, or indicator, or enter invalid information in a fixed field, Horizon marks the invalid information as an error. (For more information, see **Activating Error Checking in Records** on page 22.)

You can go back to the previously saved record at any time while you are editing by closing the record without saving it. You can also use Undo ( ) and Redo ( ) to move sequentially through any changes made since the last time you saved the record. If your system administrator has set it up, you can check the spelling in specific subfields of a record. You can see how the record will look before you save it by reformatting it. However, once you save a record, you must re-edit the record to reverse any changes.

This section explains these topics:

- **Editing the Header** on page 64
- **Editing Information in a MARC Record** on page 64
- **Checking the Spelling in a MARC Record** on page 75
- **Reformatting a MARC Record** on page 78

Editing the Header

The header runs across the top of each MARC record. It displays this information:

- The record's status
- The date the record was created
- The date the record was last updated
- The record's ownership
- The number of items associated with the record
- A description for the field (tag, indicator, or subfield) where the insertion pointer is

You can edit the background and text colors for the header. (For instructions, see **Choosing a Background Display** on page 27.) You must edit the other information in the header from the control record. (For more information, see **Adding or Editing Information in a Control Record** on page 231.)

Editing Information in a MARC Record

A MARC record is made up of components such as tags, indicators, fields, and subfields. Each component contains specific information that can be added or edited as necessary. If your system administrator has defined relationships between bib and item records, Horizon lets you choose to change the call numbers in any attached copy and item records.

Besides changing the information in a component, you can also use special techniques to control how search results are sorted. You can also enter special characters not typically found on a keyboard.

Before you edit an authority-controlled tag, check for an existing authority to make sure that you do not change anything that you do not want to change. (For more information, see **Editing Authority Records** on page 119.)

This section explains these topics:

Cutting, Copying, Pasting, and Deleting Information in a MARC Record

When you want to move, copy, or delete information in a MARC record, you first choose the information by highlighting it. You can choose parts of a MARC record in these ways:

- By dragging the mouse pointer over the portion that you want.
- By right-clicking on a tag or subfield and choosing from the pop-up screen.
- By clicking on a tag or subfield and using the Edit drop-down menu to display selection choices.
- By using **TAB**, **Shift+TAB**, and the arrow keys to move around the record, and highlighting information using **SHIFT**+any arrow key.
- By using keyboard shortcuts. (For more information, see **Customizing Keyboard Shortcuts** on page 35.)

The MARC Editor follows these conventions when you cut and paste subfield information:

- When only subfield text is selected for deletion, the paste is a simple text replacement and the pasted text replaces the selected text.
- When the text selected for deletion includes the subfield ID and part (but not all) of the subfield text, the deletion leaves the paste point in the subfield ID. Then Horizon uses the first character of the text that you paste as the new subfield ID and discards the rest of the material.
- If all of the subfield text and the subfield ID are selected for deletion and the subfield being deleted is the only subfield in the tag, the deletion leaves a tag with no subfields. Horizon inserts a new subfield with no ID and pastes the subfield data text.

Once you choose the information that you want, you can use standard Windows delete, cut, copy, and paste commands to move the information. (You can also right-click on a tag or subfield, or use the Edit drop-down menu, and then choose to copy or delete information.) Your system administrator can control whether you have the rights to edit or delete information in subfields and tags.

Editing Components of a MARC Record

You can edit these elements of a MARC record:

- **Tags**. The tag is the three-digit number associated with each field. You can change or add tags in a MARC record.
- **Fixed Fields**. Fixed fields in a MARC record include the leader and the 0XX tagged fields. They are divided into positions, which contain information in abbreviated form about the record. This information can only fill the predefined length of the field. Some positions accept not only a certain length of information, but a specific set of values or codes defined by MARC standards.

  Fixed fields are also called “controlled text.” Make sure that you understand MARC standards before you make any changes in fixed fields. (For more information, see Library of Congress publications about MARC, or visit the Library of Congress web site at http://lcweb.loc.gov/marc/.)
- **Indicators**. Horizon displays an undefined indicator as an underscore (_). You can edit an indicator by replacing it with a lowercase alphanumeric character or by deleting the existing character. Make sure that you understand MARC standards before you make any changes in indicators. (For more information, see Library of Congress publications about MARC, or visit the Library of Congress web site at http://lcweb.loc.gov/marc/.)
- **Nonlinking fields**. A nonlinking field resides in only one record and does not link to any other record. Most fields in a record are nonlinking. You can edit text in any nonlinking subfield at any time. Because the field does not link to any other record, any changes you make affect only the record that contains the nonlinking information. You can change the whole field or a part of it.
- **Linking subfields**. A linking subfield attaches the bib record to another source of information (for example, another record or an electronic location). When you edit a linking subfield, the changes can affect every record in your database that is attached to the subfield that you edit. Make sure that your information is accurate before you edit a linking subfield.

If you have error checking turned on, double-clicking on an error message positions your cursor in the record at the error so that you can correct it easily. (For more information, see **Activating Error Checking in Records** on page 22.)

You can use **SHIFT+F1** from a valid MARC tag in a MARC record to link directly to the Library of Congress web site where that tag is explained. Your system administrator can change the link so that it finds a different URL. (For instructions, see “Setting Up or Changing Valid MARC Record Components” in the *Cataloging Setup Guide*.)

To edit components of a MARC record

1. Open a MARC record.
2. Do one of these options:
   - Put your insertion pointer on the left side of the component where you want to enter information.
   - Highlight the information that you want to change.
3. Enter the new information for that component.

Note: When you have your insertion pointer in a component marker (such as a tag, indicator, or subfield delimiter) or in any other component that has valid values defined, you can press **F12** for a list of valid codes. Double-clicking on the code that you want inserts it into the proper position. (Horizon notifies you if no valid codes are available.)

Moving Tags in a MARC Record

Horizon 7.4 and later versions let you move tags in a MARC record without breaking any links in link tags. It is not necessary to cut and paste tags if you need to move them. (Cutting and pasting breaks any links between tags.) The ability to move tags is useful if you want to order tags numerically.

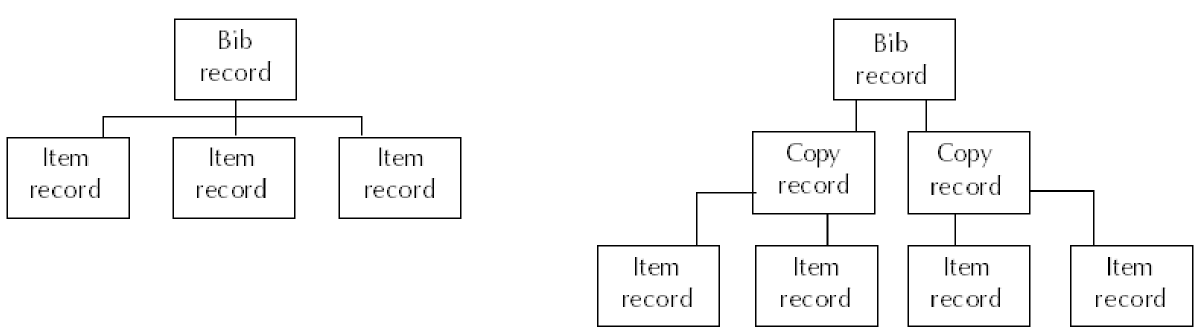
To move tags in a MARC record

1. In the MARC record, place your cursor in the tag you want to move.
2. Do one of these options:
   - Choose **Edit, Move Tag up** or **Move Tag down**.
   - Choose **CTRL +** the up arrow or down arrow.
3. Save your changes.

Editing Call Number Fields in Bib, Copy, and Item Records

You can edit any call number field in the same way that you edit other MARC record fields. However, if your system administrator has defined relationships between bib and item records, Horizon creates a connection between the call number fields. (For more information, see **Automatically Filling the Call Number Field in a New Item Record** on page 148 and **Automatically Filling the Call Number Field in a New Copy Record** on page 182.) If you edit a call number in a saved bib or copy record with a call number field connection, the connection prompts Horizon to ask if you also want to change the call numbers in any attached copy and item records.

Horizon attaches an item record to a bib record either directly or through a copy record. Copy records attach directly to bib records. Here are examples of the attachment hierarchies:



The connection made when your system administrator defines relationships between records lets you edit all related call numbers only from the top of the hierarchy down. This means that when you make changes to the call number in a bib record, Horizon asks if you want to make the same change in the attached copy and item records. If you make changes to the call number in a copy record, Horizon asks if you want to make the same change in the attached item records. However, Horizon cannot apply changes you make in an item or copy record to a bib record, or from an item record to a copy record. If you want to do this, you must edit the records manually.

Editing Text to Control the Sort Order of Records

By default, Horizon sorts records found in a search by nonalphabetical characters first, followed by alphabetical characters from left to right.

Here are ways that you can change the sort order of items:

- Use a nonfiling indicator in the second indicator position of the title field. These indicators determine how many leading characters Horizon ignores when it creates a list that you can browse alphabetically. (For instructions, see **Editing Components of a MARC Record** on page 65. For more information about nonfiling indicators, see **Understanding Indicators** on page 42.)
- Enter nonsorting delimiters around characters or words in a field that you want displayed, but not used for sorting. (For example, if you want an author whose last name is MacDonald to display as “MacDonald” but to sort with authors whose name is “McDonald,” enter the “a” between these delimiters.)
- Enter sorting-only delimiters around characters or words in a field that you want sorted, but not displayed. (For example, if a title begins with the number “8,” you can have it sort by but not display the word “eight.” Enter “eight” between these delimiters with the number “8” just following.)

To edit text to control the sort order of records in staff searching

1. Open a MARC record.
2. Click where you want to insert the sort delimiters.
3. Do one of these options:
    - If you want to enter nonsorting delimiters, choose **Edit, Insert Delimiters, Non-Sorting**.
    - If you want to enter sorting-only delimiters, choose **Edit, Insert Delimiters, Sorting-Only**.

    Horizon inserts the delimiters and puts the insertion pointer between them.
4. Enter the appropriate characters between the delimiters.

Entering Special Characters

You can enter most characters in a MARC record with your keyboard. However, some special characters do not appear on the keyboard. These characters include diacritical marks that show how to pronounce a letter, such as “é” or “ñ.” Horizon lets you enter special characters, including diacritics, into MARC records.

Depending on the font used for the application that displays MARC records, some special characters might not display properly. (For instructions on changing your font, see **Changing Font Options** on page 28.)

This section explains these topics:

- **Using the Diacritic Button Bar** on page 69
- **Using the Diacritic Shortcut Bar** on page 71
- **Using the ALA Hex Set** on page 73
- **Using the Windows Character Map (Charmap)** on page 72
- **Using Unicode** on page 74

Using the Diacritic Button Bar

The Diacritic Button bar shows a graphic representation of the available special characters on buttons. You can click the buttons to place the special characters in the MARC record where you have your insertion pointer. You can select a character list to display the set of buttons that you use most often.

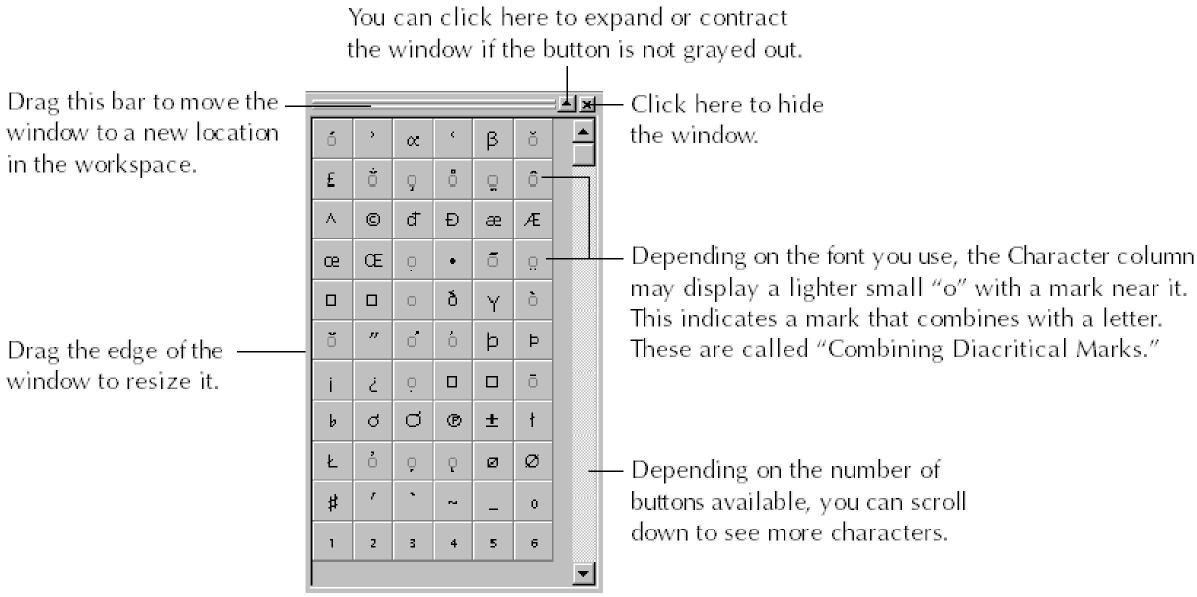
You can customize the Diacritic Button bar to include the special characters that you use most often. (For instructions, see “Creating or Editing a Diacritic Shortcut” in the “Customizing Diacritics” chapter of the *Launcher Configuration Guide*.)

To enter special characters using the Diacritic Button bar

1 Open a MARC record.

2 If the Diacritic Button bar is not open, choose **View, Diacritic Button Bar**, or click the **Toggle Diacritic Button Bar** icon ( ).

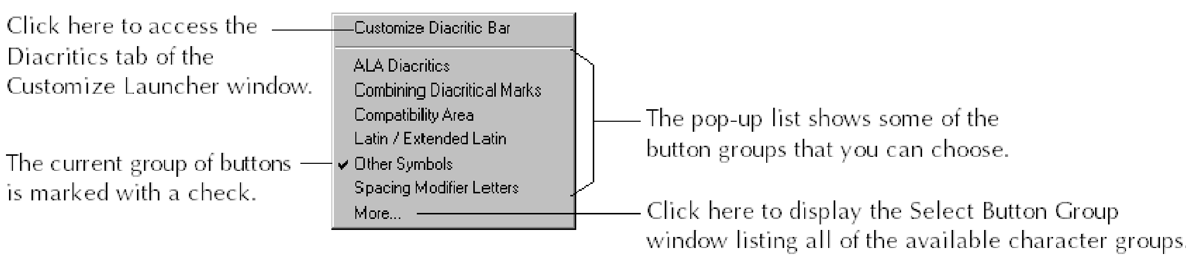
Here is the Diacritic Button bar with the ALA Diacritics group of buttons displayed:



3 Do any of these options, as necessary:

- To see more characters, click the **Expand** button ( ), or use the scroll bar.
- To get a pop-up menu of other character lists, right-click the Diacritic Button bar.

  Horizon displays this window:



4 If you want to choose a different character group for the Diacritic Button bar, do one of these options:

To choose a character group from the pop-up list	To choose a character group from the full list
1. Find the name of the character group that you want to use. 2. Click the name of the set. Horizon displays the characters from that group in the Diacritic Button bar.	1. Click **More**. Horizon shows the Select Button Group window. 2. Find the name of the character group that you want to use. 3. Double-click the name of the group. Horizon displays the characters from that group in the Diacritic Button bar. The next time you open the pop-up list, your most recent choice displays at the top of the list of eight group options with a check mark beside it.

5 To remove the Diacritic Button bar from the workspace, click the **Hide docked window** button ( ), or click the **Toggle Diacritic Button Bar** icon ( ).

Using the Diacritic Shortcut Bar

The Diacritic Shortcut bar lists commonly used special characters, the keystrokes that can create those characters, and a description of each character. You can perform the keystrokes that create a specific character with or without displaying the Diacritic Shortcut bar. However, if the Diacritic Shortcut bar is open, you can double-click your choice from the list to have it entered at the insertion point.

You can customize the Diacritic Shortcut bar to include the special characters that you use most often. (For instructions, see “Creating or Editing a Diacritic Shortcut” in the “Customizing Diacritics” chapter of the *Launcher Configuration Guide*.)

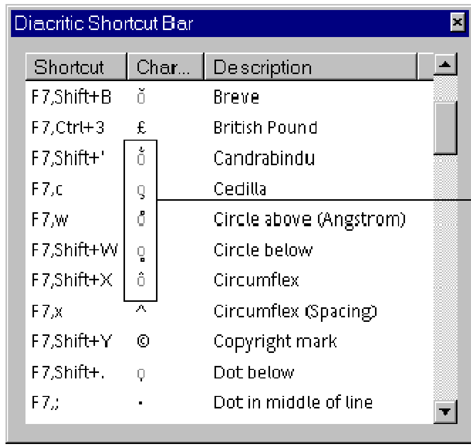
In the Shortcut column, all the keyboard letters display as uppercase. However, if the keystroke combination does not include pressing the **SHIFT** key (for example, **F7**,**A**), then type the letter without shifting. The **CAPS LOCK** key can be on or off while you enter these shortcuts, as it does not affect the codes.

To enter special characters using the Diacritic Shortcut bar

1 Open a MARC record.

2 To display the Diacritic Shortcut bar, choose **View, Diacritic Shortcut Bar**, or click the **Toggle Diacritic Shortcut Bar** icon ( ).

Horizon displays the Diacritic Shortcut bar:



Shortcut	Char...	Description
F7,Shift+B	ŏ	Breve
F7,Ctrl+3	£	British Pound
F7,Shift+'	o̐	Candrabindu
F7,c	o̧	Cedilla
F7,w	o̊	Circle above (Angstrom)
F7,Shift+W	o̥	Circle below
F7,Shift+X	ô	Circumflex
F7,x	^	Circumflex (Spacing)
F7,Shift+Y	©	Copyright mark
F7,Shift+.	ọ	Dot below
F7,;	·	Dot in middle of line

In the Character column, a light lowercase “o” with a mark near it shows how the mark will combine with the letter in the MARC record.

3 Put your insertion pointer where you want to add a special character.

4 Do one of these options:

- Press the key combination from the Shortcut column for the character that you want.
- Double-click the shortcut, character, or description of the character that you want.

Note: Depending on the font you use, a character in the Characters column may show a lighter small “o” with a mark near it to indicate a mark that combines with a letter in the manner shown. These are called “Combining Diacritical Marks.” When you invoke this kind of character, the mark combines with the letter to the left of the insertion pointer.

Using the Windows Character Map (Charmap)

You can enter special characters by using the Windows Character Map (Charmap), which displays characters based on language or symbol charts. You can use the Character Map to see all the special characters available in the font that you are using. (For more information about Charmap, see the Windows online help or user’s manual.)

Although you can use the Charmap characters to add text to a record, other methods can take less time. Using the Diacritic Button bar may be the fastest way to enter special characters for most users. (For more information, see **Using the Diacritic Button Bar** on page 69.)

To enter special characters using the Windows Charmap

1 Open a MARC record.

2 Choose **Start, Programs, Accessories, Character Map**.

3 In the **Font** field, use the pull-down menu and highlight the font that you want.

Note: If you choose a font that is different from the font that you are using for editing, Horizon may not show the characters that you choose.

4 Double-click the character that you want.

The system puts that character into the Characters to Copy field.

5 If you need to add a string of characters, repeat step See "Double-click the character that you want." until you have all the characters that you want.

6 Click **Copy**.

7 Click **Close**.

8 Put your insertion pointer in the record where you want to enter the special characters.

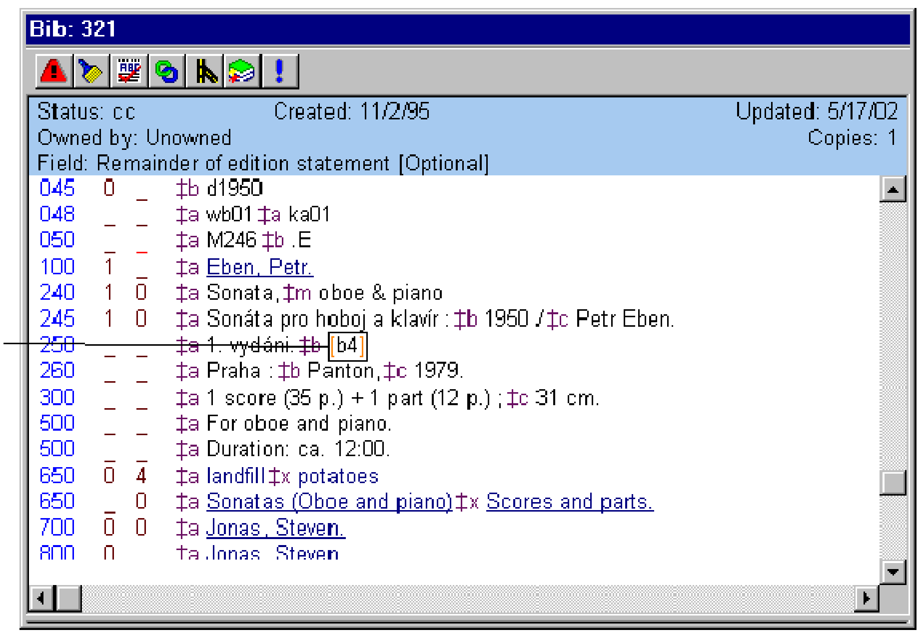
9 Press **CTRL+V** to paste the new characters into the field.

Using the ALA Hex Set

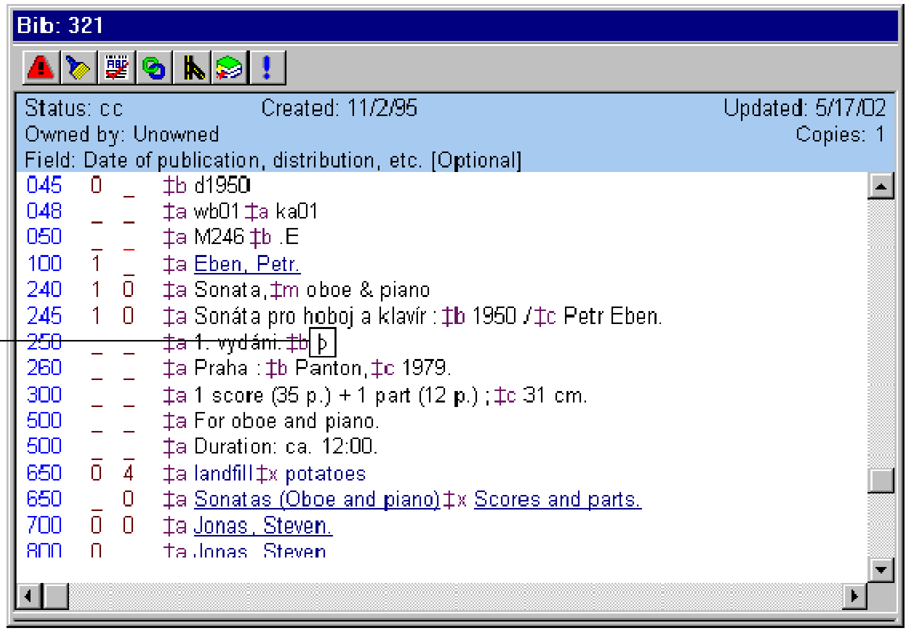
You can enter special characters using an ALA hex set. A hex set is a code for a special character that you enter between ALA delimiters. (For a list of hex set codes, see Appendix: Appendix A, "ALA Hex Sets" on page 272.) While some Public Access Catalogs (PACs) may be able to display only the MARC character closest in appearance to the hex set, the code remains in the bib record so that any utility that can interpret the set can display the correct character.

For example, if you want to enter the lowercase Icelandic thorn, enter the hex set for that character between two ALA delimiters:

This is the ALA hex set code for the Icelandic thorn, lowercase, entered inside the code delimiters.



After you move out of a subfield or save your record, Horizon displays the character correctly if the font you are using can display the character:



The lowercase Icelandic thorn as interpreted and displayed by Horizon

Horizon also exports the character in ALA hex code so that other computers can interpret it.

To enter special characters using an ALA hex set

1. Open a MARC record.
2. Put your insertion pointer where you want to enter a special character.
3. Choose **Edit, Insert Delimiters, Embedded ALA.**

   Horizon inserts the delimiters and puts the insertion pointer between them.

4. Type the code for the special character that you want. (For a list of codes, see Appendix: Appendix A, "ALA Hex Sets" on page 272.)

   Horizon displays the code to the appropriate special character as soon as you leave the subfield or when you reformat or save the record.

Using Unicode

Unicode lets you store and display multilingual text on your computer. Horizon can store and display MARC records in Unicode. However, your workstation must be able to handle Unicode. (For more information, see “Learning About Horizon’s Unicode Capabilities” in the “Getting Started” chapter of the *System Administration Guide*.)

You must be running Windows NT, Windows 2000, or Windows XP to use Unicode. You must also specify a Unicode font to use in Horizon. (For instructions on choosing the font for Horizon, see “Logging In to and Out of Horizon” in the “Getting Started” chapter of the *Horizon Basics Guide*, or see **Changing Font Options** on page 28.)

Horizon uses Unicode to translate the characters in a MARC record and display them properly. However, the number of characters available for display depends on the font used on your workstation. One Unicode font is available in Windows NT. Horizon includes an additional Unicode font (Andale WT J).

A character that cannot display in Unicode may display as a place-holding character such as an empty box or a solid bar, or as the raw code. (For example, <U+00e6> is the raw code for the digraph "ae.") Horizon saves the code for any of these characters with the file so that when a Unicode-capable font is used, whether on the Horizon workstation or on another computer to which you have exported the file, the character will display correctly.

Data entry is also dependent on which codepage is specified for your workstation. This means that you can enter Turkish characters with a Turkish codepage specified or Russian with a Russian codepage specified, but you cannot enter Turkish characters with a Russian codepage specified, and vice versa. (A codepage tells your computer which set of language characters to use as display characters. For more information, see your Windows user guide or Windows online Help.)

You might want to enter a special character using Unicode values. Horizon can display some Unicode values. (For more information, see "Creating or Editing a Diacritic Shortcut" in the *Launcher Configuration Guide*.)

For more information on Unicode, including character set tables, see the document from the Library of Congress titled "MARC 21: Specifications for Record Structure, Character Sets, and Exchange Media" at this URL: http://lcweb.loc.gov/marc/specifications/. You can also go to the Unicode Home Page at http://www.unicode.org.

To enter special characters using Unicode

1. Open a MARC record.
2. Put your insertion pointer where you want to add a special character.
3. Enter the Unicode value in the form <U+*XXXX*> where the *X*s are alphanumeric characters.

   Any letters that you use can be either uppercase or lowercase. Horizon displays the Unicode character as soon as you move the pointer out of the subfield or when you reformat or save the record.

Checking the Spelling in a MARC Record

You can check MARC records for spelling errors. If Horizon cannot find a word in the spelling dictionary to match a word that it finds in your record, the system displays the word so that you can correct it or add it to the custom dictionary.

The custom dictionary is a file that Horizon keeps on your local hard drive. The file accepts any words that you want the system to "learn" and supplements the main dictionary. If you add words to the custom dictionary that should not be there, your system administrator can delete them. (For more information on setting up spell checking for MARC records, see "Setting Up and Maintaining Spell Check" in the "Setting Up or Changing Valid MARC Record Components" section of the *Cataloging Setup Guide*.)

The spelling checker searches through only those subfields that have been flagged to be checked by your system administrator.

To check the spelling in a MARC record

1 Open a MARC record.

2 Choose **Tools, Spell Check**, or click the **Spell Check** icon ( ) in the editing window toolbar.

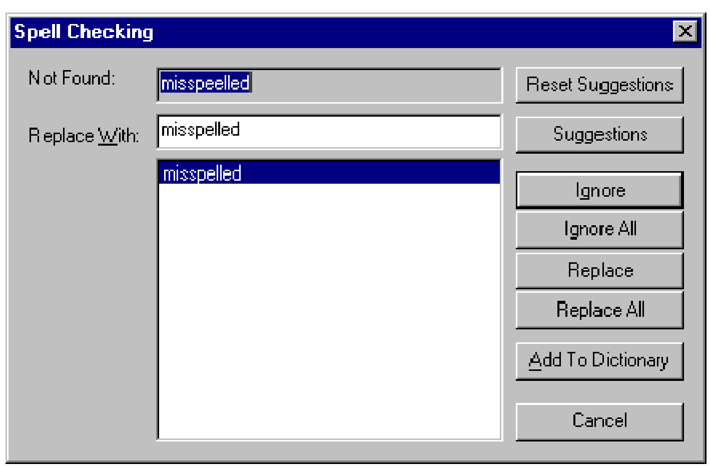
Horizon checks the spelling in all subfields flagged by the system administrator.

3 Do one of these options:

- If all words in the subfields are spelled correctly, click **OK** when Horizon displays the dialog box telling you that spell checking has finished with the record:

  The task is finished.

- If Spell Checking finds a word that is not in its dictionary, Horizon displays the Spell Checking window with the word listed in the **Not Found** field along with suggested replacements in the **Replace With** field:



Note: If Spell Checking does not recognize any possible replacements for a word in your record, the Spell Checking window displays a blank **Replace With** field and the message “[No suggestions]” in the list window.

4 Do one or more of these options, as needed:

If you want to do this	Do this
Replace the misspelled word with the main suggestion	Do one of these options: • If you want to replace only this occurrence of the word, click **Replace**. • If you want to replace all occurrences of the word throughout the record, click **Replace All**. Horizon replaces the word (or all occurrences) and continues checking spelling.
Replace the misspelled word with a suggestion from the list	1. Click the word that you want in the list window. Horizon highlights the word in the list and puts the word in the Replace With field. 2. Do one of these options: • If you want to replace only this occurrence of the word, click **Replace**. • If you want to replace all occurrences of the word throughout the record, click **Replace All**. Horizon replaces the word (or all occurrences) and continues checking spelling.
See more suggestions for a replacement for the word.	Click **Suggestions**.
Reset back to the original suggestion list (after you chose Suggestions)	Click **Reset Suggestions**. Horizon resets the suggestion list back to the replacements it suggested first.
Replace the misspelled word with a correction you make	1. Enter the correct word in the **Replace With** field. 2. Do one of these options: • If you want to replace only this occurrence of the word, click **Replace**. • If you want to replace all occurrences of the word throughout the record, click **Replace All**. Horizon replaces the word (or all occurrences) and continues checking spelling.

If you want to do this	Do this
Add the word to the dictionary for future reference	Click **Add To Dictionary**. Horizon adds the word to the dictionary file on the hard drive of your local workstation. Because Horizon saves the word on only your local drive, you might have to add the word again if you work at a different workstation. **Note:** Be sure to add only those words that you really want. If you add a word by mistake, have your system administrator correct the error in the dictionary file. (For instructions, see "Setting Up and Maintaining Spell Check" in the "Setting Up or Changing Valid MARC Record Components" section of the *Cataloging Setup Guide*.)
Leave the word as it is	Do one of these options: • If you want to ignore only this occurrence of the word, click **Ignore**. • If you want to ignore all occurrences of the word throughout the record, click **Ignore All**. Horizon ignores the word (or all occurrences) and then finds the next suspect word.

When Spell Checking has checked all the spell check-enabled subfields in the record, Horizon displays this window:

5 Click **OK** to close the window and the spell checker.

Reformatting a MARC Record

When you reformat a MARC record, Horizon sorts the tags of the MARC record in the order that your system administrator designates and deletes all unused tags and fields that may occur in the record. This lets you create or edit a bib record and enter tags as you think of them, rather than in any specific order.

Reformatting a record makes the record appear as it will be when you save it. This process does not update any links or any indexes associated with the record.

Constraints

- If you reformat before you save, you can use Undo ( ) and Redo ( ) to alter your current changes to the record. You cannot use Undo and Redo once you save the record because saving the record applies the changes to the Horizon database.

- In order for Horizon to update links and indexes, you must save the record *after* you format it. Using the reformatting feature only lets you see your changes before they actually take affect in Horizon.

Your system administrator can set up the MARC Editor to sort tags alphabetically, numerically, by numerical group, or not at all. (For instructions, see “Setting Up or Changing General Cataloging Type Parameters” in the “Setting Up or Changing Valid MARC Record Components” section of the *Cataloging Setup Guide*.)

To reformat a MARC record

1 Open a MARC record.

2 Make the changes that you want to make.

3 Choose **Marc, Reformat**, or click the **Reformat Record** icon ( ) on the toolbar in the edit window.

Horizon removes any unused tags and subfields and puts added tags

Saving and Closing a MARC Record

Once you have made the changes that you want to make in a record, you need to save the changes. If your system administrator has chosen a specific sort tag action, Horizon sorts the tags of a MARC record in that order when you save. Horizon also deletes all unused tags and fields that may occur in the record. (For more information, see “Setting Up or Changing General Cataloging Type Parameters” in the “Setting Up or Changing Valid MARC Record Components” section of the *Cataloging Setup Guide*.) You can also save a record when you close it.

When you save an authority-type MARC record, Horizon looks in your database for an existing record with the same main heading. If Horizon does not find a match, Horizon saves the record you created or edited. If Horizon finds a match, Horizon displays the matching authority record number and lets you choose one of these options:

- Continue with the existing authority record instead of the one you created or changed.
- Merge the two records
- Keep both the new and the existing authority record in your database.

If you want to manually check for a matching authority record using more than the main heading, you can use staff searching. (For instructions, see **Using Staff Searching to Find an Authority Record** on page 118.)

To save and close a record

1 Open a MARC record.

2 Make the changes that you want to make in the record.

3 If you want to see what the record will look like when you save it but you do not want to save it yet, choose **Marc, Reformat**.

4 Do one of these options:

- If you want to leave the record open after you save the changes, choose **File, Save**.

  Horizon removes any unused tags and subfields, puts the information that you added into its appropriate place, and then saves the record. Horizon leaves the record in your workspace.

- If you want to close the record and save the changes, choose **File, Close**, and answer **Yes** to save the changes.

  Horizon removes any unused tags and subfields, puts the information that you added into its appropriate place, and then saves and closes the record.

If you are saving an authority MARC record and Horizon finds a match, Horizon displays a message telling you that a matching authority record was found in the database.

5 If Horizon finds a match for an authority record, choose one of these options:

- **View matching record**. This option closes the new or edited authority record without saving it and opens the existing authority record in the MARC Editor.
- **Save and Merge Authorities**. This option saves the new or edited authority record and opens both the new or edited record and the existing record in the merge utility so that you can merge the two records. By default, Horizon uses the new or edited authority record as the surviving record, but you can choose to use the existing authority record as the survivor.
- **Save only**. This option saves the new or edited record as a separate authority record and also keeps the existing authority record.

Printing a MARC Record

You can print a record once you have it displayed on your screen by using standard Windows printing commands. You can print batches of MARC records using the same steps that you would use to export batches of records. (For more information, see **Choosing Batches of Records for Exporting or Printing** on page 257.)

Chapter 4: Bibliographic Records

This chapter explains additional ways you can work with new and existing bibliographic (bib) records, including merging and linking bib records to other bib records.

This chapter contains these sections:

About Bibliographic Records

The primary goal of cataloging is to make items readily accessible to the user. Bibliographic (bib) records provide this access. However, a bib record by itself does not indicate that a specific item exists in your library. Item records—one for each item—must be attached to bib records to represent individual items on your shelves. You must have a bib record for each title and an item record for each item in your holdings. (For more information about item records, see **Item and Copy Records** on page 134.)

Horizon stores bib information in standard MARC format, though it can display special characters. (For more information, see **Entering Special Characters** on page 69.) You can either import existing bib records in MARC format, or create original records yourself in either MARC or non-MARC format. (For instructions, see **MARC Editing** on page 40 and **Non-MARC Editing** on page 265.)

Before you create or update bib records in Horizon, your library should decide what standards to use. Your library is responsible for choosing and implementing a classification scheme, adopting cataloging rules and standards, and providing individualized quality controls. To help you, Horizon Cataloging has built-in quality controls that ensure accuracy and consistency. You can customize some aspects of bib records to reflect your standards. (For more information, see the *Cataloging Setup Guide*.)

Creating a New Bib Record

To create a new bib record, you either copy an existing bib record or choose a workform to act as the “skeleton” for the new bib record. In this basic skeletal workform, you can add, edit, or delete tags, indicators, and subfields to create the records that you need. Some workforms come with Cataloging when Horizon is installed. You can create new workforms or edit existing ones to suit your library’s needs. (For instructions on creating workforms, see **Workforms** on page 214 chapter. For instructions on copying a bib record, see **Copying a Bib Record** on page 97.)

You can create both MARC and non-MARC bib records. (For instructions, see the “**MARC Editing**” and “**Non-MARC Editing**” chapters.)

If needed, you can be taken directly to external help for defining MARC tags. (For instructions on using external MARC help links, see **Using Catalog Context Links** on page 48.)

To create a new bib record

1 Start the **Create New Bib** process.

The default location of this process is the **Cataloging\Bibliographic Record** folder on the navigation bar.

Horizon displays the Code Lookup Bib Workforms window.

2 Highlight the workform that you want from the list.

3 Click **OK**.

Horizon opens a new bib record in the MARC Editor based on the workform that you chose.

Note: If you chose a non-MARC workform, see **Non-MARC Editing** on page 265 for instructions.

4 Enter the necessary information in each appropriate component of the workform.

You can add more tags and subfields as needed. (For instructions, see **Adding a Component to a MARC Record** on page 48.)

Important: If you add information in an authority tag, check to see if the authority heading that you want to use already exists in your database before you create a new one. (For instructions, see **Adding a Link Tag to a Bib Record** on page 50.)

Note: If duplication checking is enabled, if you enter a duplicate ISBN or ISSN, the system flags that tag in red, however you may still be allowed to create the bib record. It is up to you to sort out how to handle duplicate entries and take appropriate action.

5 Save your changes.

Horizon removes unused tags and assigns a bib number to the record.

Finding and Opening an Existing Bib Record

Before you can edit an existing bib record, you must find it in your database and open it.

This section explains these topics:

- **Using Bib Quick Search** on page 83
- **Using Staff Searching to Find Bib Records** on page 83
- **Accessing Another Library's Bib Records Using Z39.50** on page 87

Using Bib Quick Search

When you add records to your catalog either manually or automatically (by importing), Horizon assigns each record a sequential number. (Horizon posts this number in the upper-left corner of the bib record.) If you know this bib number, you can use it to open the record using Bib Quick Search. You can also use Bib Quick Search to search for a bib record by using the item barcode.

Your system administrator can set up Bib Quick Search to find bib records by using other indexes whose search resolves to a single result. (For example, Bib Quick Search could search for the ISBN or LCCN.) (For instructions, see "Adding a Search to Bib Quick Search" in the *Cataloging Setup Guide*.)

To use Bib Quick Search

1 Start the **Bib Quick Search** process.

The default location of this process is the **Cataloging\Bibliographic Record** folder on the navigation bar.

Horizon opens the Search Bib Quick Search window.

2 Highlight the index that you want to search in the **Indexes** box.

3 Enter the number for the item in the **Search for** field.

4 Click **OK**.

Horizon opens the record in the MARC Editor.

Using Staff Searching to Find Bib Records

Since a bib record represents a specific title, you can locate the title entry in staff searching and send its bib record to the MARC Editor. You can locate and send a single title, or you can locate and send multiple titles to the MARC Editor at the same time. You can find title entries from any of these staff searching result screens:

- Titles
- Alphabetical Titles
- Bibliographic Detail

You can also locate multiple titles by using the Command mode in staff searching. (For more information, see “Doing an Expert Search” in the “Searching” chapter of the *Horizon Basics Guide*.)

If you need to search for a string that contains special characters (such as for Greek or Cyrillic) and you want to type those characters in the search parameters field, you must set this up in the keyboard settings of your Windows program. You can find the language options in Input Locales in the Keyboard settings in the Control Panel. (For instructions on setting up Windows to enter these special codes, see your Windows manual.) To display the characters in Horizon, you must choose a Unicode-compatible font for Horizon. (For instructions on choosing the font for Horizon, see the “Logging In to Horizon” section in the “Getting Started” chapter of the *Launcher Configuration Guide* or **Changing Font Options** on page 28.)

This section explains these topics:

- **Finding Bib Records using a Single Search Parameter** on page 84
- **Finding Bib Records using Expert Search** on page 85

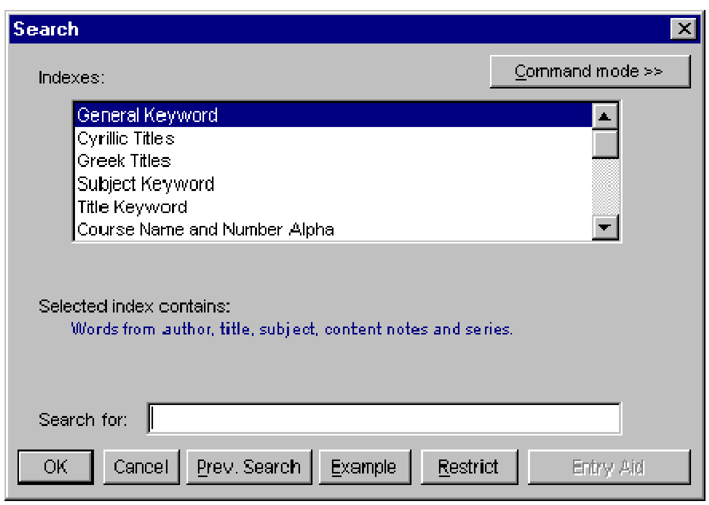
Finding Bib Records using a Single Search Parameter

To find bib records using a single search parameter

1 Start a **New Search**.

To do this, press **F2**, or find the process in the **Searching** folder on the navigation bar.

Horizon displays the Search window:



2 Highlight the index that you want to use.

3 Search for the titles that you want to view. (For instructions, see the “Searching” chapter of the *Horizon Basics Guide*.)

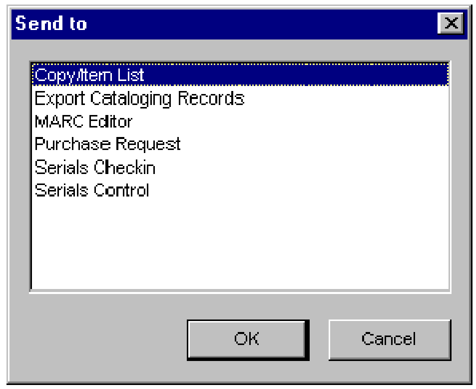
4 Continue with the search until the system displays either a Titles list window or a Bibliographic Detail window.

5 Highlight the titles that you want.

If you highlight more than one title, Horizon will send all the bib records that you highlight to the MARC Editor.

6 Choose **Edit, Send to**, or click the Send to icon ( ).

Horizon displays the Send to dialog box:



7 Double-click **MARC Editor**.

Horizon opens the bib record in the MARC Editor.

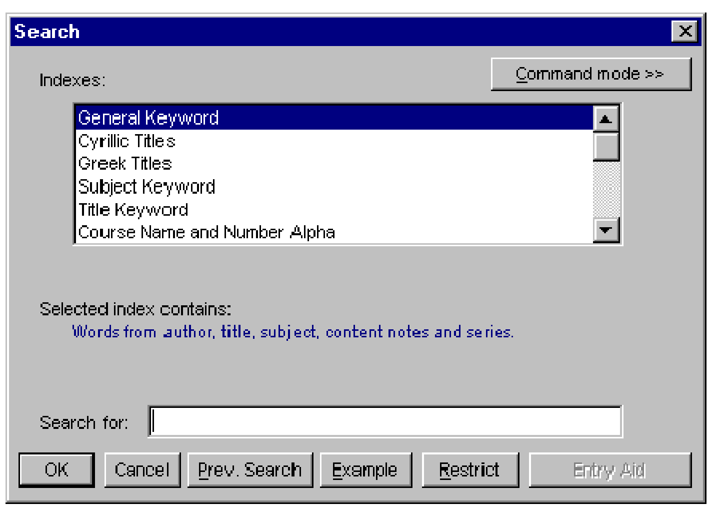
Finding Bib Records using Expert Search

To search for bib records using Expert Search

1 Start a **New Search**.

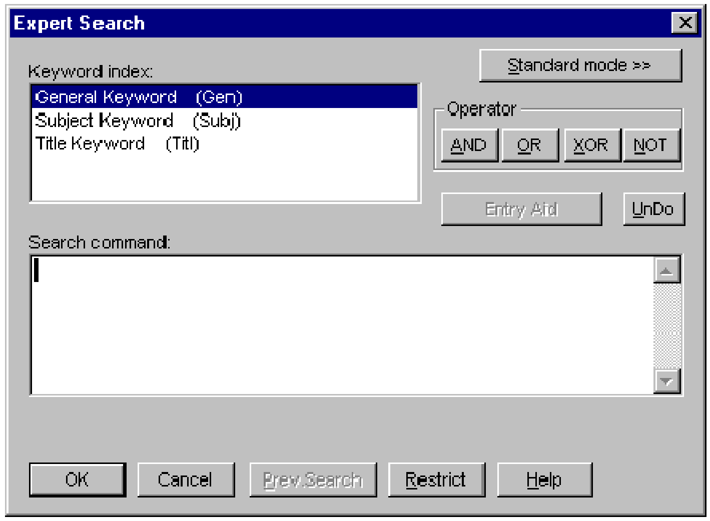
To do this, press **F2**, or find the process in the **Searching** folder on the navigation bar.

Horizon displays a Search window:



2 Click **Command Mode > >**.

Horizon displays the Expert Search window:



3 Highlight the Keyword index that you want to use.

4 Create a search by entering appropriate search terms and operators for the index you choose.

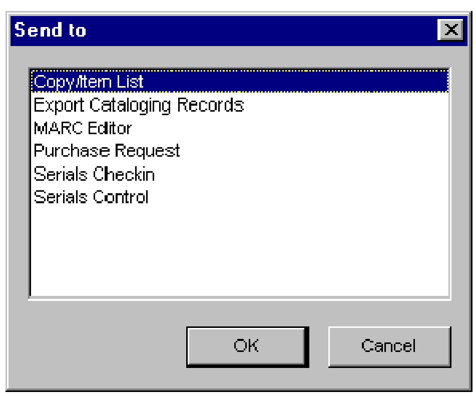
5 Click **OK**.

Horizon displays the Titles list window with the results of your search.

6 Highlight all the titles that you want to send to the MARC Editor.

7 Choose **Edit, Send to**, or click the Send to icon ( ).

Horizon displays the Send to dialog box:



8 Double-click **MARC Editor**.

Horizon opens a bib record in the MARC Editor for each title that you chose.

Accessing Another Library's Bib Records Using Z39.50

You can access other library databases using the Z39.50 protocol. (For example, you can search the Library of Congress.) The Z39.50 protocol standardizes how different types of library systems share database information. Using this protocol, users can search and retrieve cataloging information from libraries on different automation systems if they have a compatible Z39.50 server.

You can search remote and local Z39.50 databases from staff searching. When you find the records that you want, you can send them to the MARC Editor to modify them and then save them into your library's Horizon database.

Before you can use this feature, your system administrator must set it up. (For instructions, see "Z39.50 Communication" in the "Searching Setup" chapter of the *System Administration Guide*.)

If you access a Z39.50 server that requires a login (such as OCLC), you must know the login for your library's access and must use it to enter that server. (For more information, see your system administrator.)

To access another library's bib records using Z39.50

1 Start the **Z39.50 Search** process.

The default location of this process is the **Searching** folder on the navigation bar.

2 Do one of these options:

If this	Do this
If your system is already connected to a Z39.50 server, Horizon displays a Search window for that server.	To search the server to which you are connected, continue with step 3. OR To search another server, do these steps: • Click **Z39.50 Server**. • Highlight the server that you want to use. • Click **Connect**. Horizon displays a Search window for that server.
If your system is *not* connected to a Z39.50 server, Horizon displays the Select a Z39.50 Server dialog box.	1. Highlight the server that you want to search. 2. Click **Connect**. Horizon displays a Search window for that server.

Note: You can search only one server at a time.

3 Highlight an index in the **Z39.50 Indexes** window.

4 Enter a search term in the **Search for** field.

5 Click **Search**.

6 Continue with the search until the system displays either a Titles list window or the Bibliographic Detail window.

7 Highlight the items that you want.

You can highlight as many items as you want to send to the MARC Editor.

8 Choose **Edit, Send to**, or click the Send to icon ( ).

9 Highlight **MARC Editor**.

10 Click **OK**.

Horizon returns to the MARC Editor and opens all the records that you highlighted.

11 Make any changes that you want to a record.

12 Save your changes to all open records.

13 Restart the **Z39.50 Search** process.

The default location of this process is the **Searching** folder on the navigation bar.

14 Click **Z39.50 Server**.

15 Click **Disconnect** to close the connection to the Z39.50 server.

Using a Selection List

Horizon lets you easily keep track of items a vendor might send you electronically (such as MARC bib records on a CD-ROM). You can use a selection list to track items that you want to review or are thinking of buying. If you decide not to buy an item on a selection list, you can remove the title from the list. If you no longer want to use a specific selection list, you can make the list inactive or delete it. You must set up Horizon to use this feature.

When you create a selection list, you assign a title's MARC bib record to the selection list you want. You can create a variety of selection lists. (For example, you may want to set up selection lists of bib records for "Best Sellers," "December Titles," or "Brodart.") You might also keep a selection list of items that you do not plan to purchase immediately, but would like to consider for purchase in the future.

Horizon does not let you delete a selection list code from your system. If you no longer want to use the list, change the status of the selection list to "Inactive." You can also delete all items from a selection list and reuse it.

This section explains these topics:

- **Setting Up Horizon to Use a Selection List** on page 89
- **Creating or Editing a Selection List** on page 95
- **Finding and Reviewing a Selection List** on page 96
- **Changing the Status of a Selection List** on page 96

Setting Up Horizon to Use a Selection List

Before you can track and review items using a selection list, you must add the "Selection list" search to the PAC flavor that you want to use to search for selection lists. You must create selection list codes that you use when you assign a bib record to a selection list. If you want to, you can set up workforms for specific selection lists. This lets Horizon automatically add any bib record you create with the workform to that workform's related selection list.

This section explains these topics:

- **Adding the Selection List Search to a PAC Flavor** on page 89
- **Creating or Updating a Selection List Code** on page 92
- **Setting Up a Workform for Selections** on page 94

Adding the Selection List Search to a PAC Flavor

Before you can track and review items using selection lists, you must add a Selection List search to the PAC flavor you want. You may want to add the Selection List search to just your staff search. This way, only your staff can see the items your library wants to review and perhaps buy. However, you may have reasons for letting borrowers search for your selection lists, such as letting borrowers use the "Selection list" search to find best sellers, or letting borrowers request items that you have not yet purchased. This lets you see the items that your borrowers would like you to buy.

To add the Selection list search to a PAC flavor

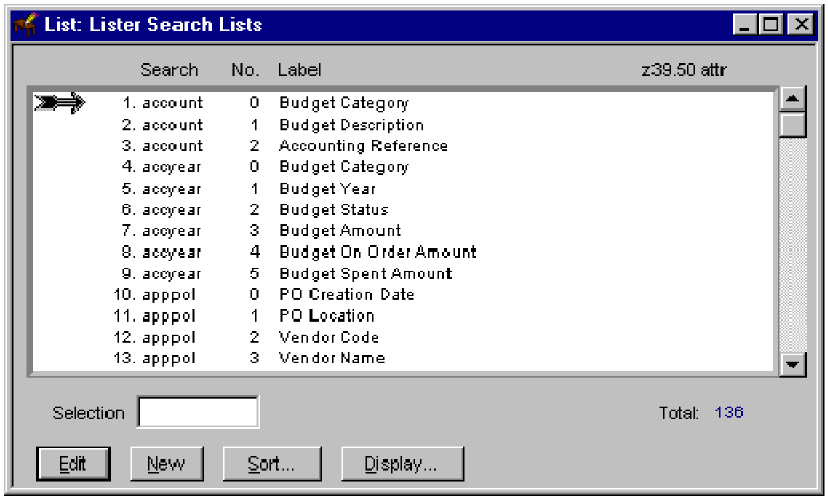
1 Start the **Table Editor** process.

The default location of this process is the **Administration** folder on the navigation bar.

2 In the **Mq View** field, start entering "search" until Horizon places the selector arrow next to the search (Lister Search Lists) view.

3 Click **OK.**

Horizon displays the List Lister Search Lists window:



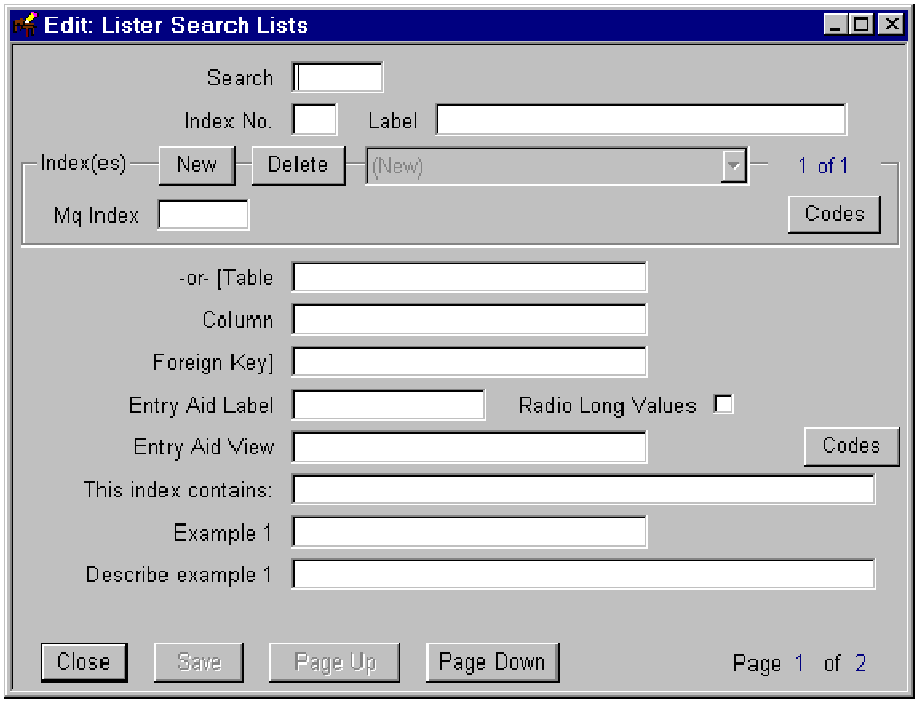
4 Do one of these options:

- If you want to create a Selection List search from scratch, click **New**.
- If you want to copy an existing search to create the Selection List search, do these steps:
  - Highlight the search that you want to copy.

Note: You may want to choose a search that is not based on an mq_index because the Selection List search is not based on an mq_index. (For more information, see “Creating a Search Option not Based on an Index” in the “Searching Setup” chapter of the *System Administration Guide*.)

  - Choose **File, Copy Record.**

Horizon displays the Edit Lister Search Lists window:



5 Complete or update these fields:

Field	Action
Search	Enter the PAC flavor in which you want the Selection search placed. (For example, enter “stafpac.”)
Index No.	Enter the number for the order in which you want Horizon to display the Selection search in the list of searches. (For example, enter “4” if you want the Selection search to display fourth in the list of searches.)
Label	Enter the description of the search that Horizon will display in the list of searches. (For example, enter “Selection List.”)
-or- [Table	Enter “bib_control” as the table from which Horizon will get the selection list information.
Column	Enter “selection” as the column from which Horizon will get the selection list information.
Foreign Key]	Enter “bib#”.
Entry Aid Label	Enter “Selections”.
Entry Aid View	Enter “selection” to use the “Acquisitions Selections” code.

Field	Action
This index contains:	Enter information that identifies what is in this index. This is a required field.

6 Complete the rest of the fields on the Edit Lister Search List window as necessary.

For more information on these fields, see “Creating a Search Option not Based on an Index” in the “Searching Setup” chapter of the *System Administration Guide*.

7 Save your changes.

You can now search for and use any selection lists you create.

Creating or Updating a Selection List Code

You assign a selection list code to a bib record to make the title represented by that bib record part of a selection list. You can create a selection list code when you import records or in the Table Editor. You can edit a selection list code only in the Table Editor. (If you do not have rights to use the Table Editor, see your system administrator.)

To create a selection list code

1 Do one of these options:

- If you want to create a code as you import a group of items to the same selection list, do these steps:
  - Start the **Import** process.

    The default location of this process is the **Cataloging** folder on the navigation bar.

    Horizon displays the Multi-Format Import window.
  - Next to the **Selection** field, click **Codes**.

    Horizon displays the Code Lookup Selection window.
  - Click **Add**.
- If you want to create a new code or update an existing one in the Table Editor, do these steps:
  - Start the **Table Editor** process.

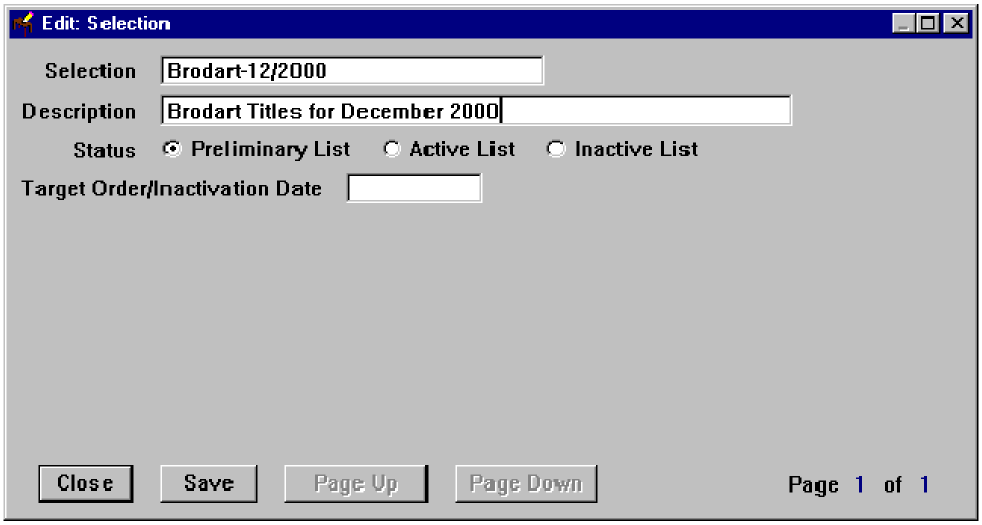
    The default location of this process is the **Administration** folder on the navigation bar.
  - In the **Mq View** field, start entering “selection” until Horizon places the selector arrow next to the selection (Acquisition Selections) view.
  - Click **OK**.

    Horizon displays the List Selection window.

– Do one of these options:

  - If you want to create a new selection list code, click **New**.
  - If you want to edit an existing selection list code, double-click the selection code that you want.

Horizon displays the Edit Selection window:



2 Complete or update these fields:

- **Selection.** Enter the code you want for the selection list. (For example, enter "Brodart-12" for a list from Brodart that you received in December.) You can enter a code that is up to thirty characters long.
- **Description.** Enter a description for the code. (For example, enter "Brodart Titles for December.")
- **Status.** Choose the current status you want for the selection list.

  Here is a description of the statuses:

Status	Description
Preliminary List	Mark this option if this list is a preliminary selection list. This list is not yet a working selection list, but one that has just been started.
Active List	Mark this option if your library still adds titles to this list and uses this list to create purchase requests and purchase orders.
Inactive List	Mark this option if your library is no longer using this selection list.

- **Target Order/Inactivation Date**. Enter the date that you want to change the status of this list to "Inactive." (For example, enter "08/30/2002".) If you do not enter a date, the list remains open indefinitely.

3 Save your changes.

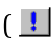
Setting Up a Workform for Selections

You can set up a workform to add titles to a specific selection list. Horizon adds any bib records that you create using this workform to the selection list that you enter.

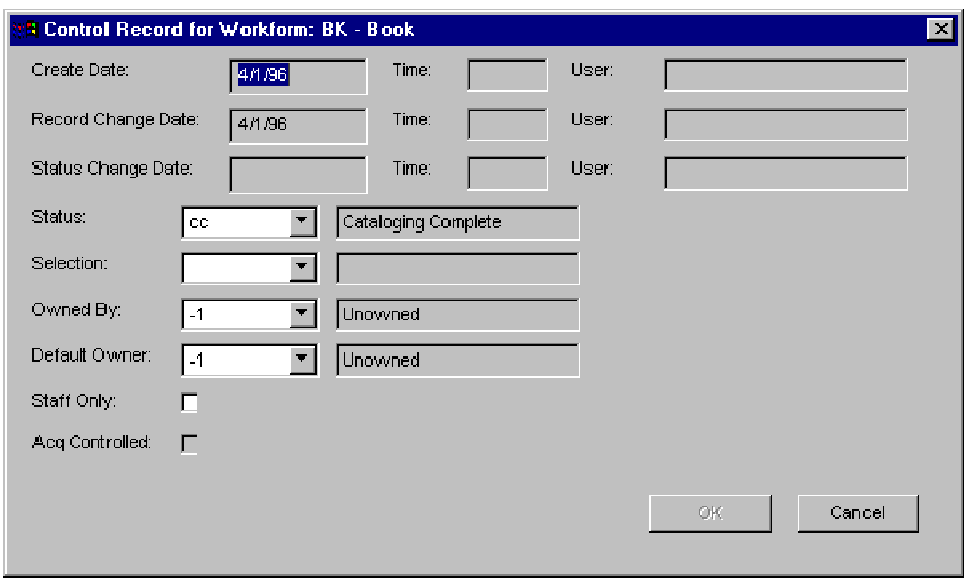
To set up a workform for selections

1 Open the workform that you want to use, or create a new one. (For more information, see **Finding and Opening a Workform** on page 226 or **Creating a MARC Workform** on page 217.)

Note: If you set up a workform for a specific selection list, name the workform something that reminds you which selection list it represents. (You cannot see the name of the selection list from the main workform window. You must click Record Status on the workform window to see if the item is assigned to a selection list.)

2 Choose **Marc, Show Control Record**, or click the **Record Status** icon ().

Horizon displays the Control Record for Workform window:



3 In the **Selection** field, enter the code for the new selection list, or use the drop-down menu to choose one.

Note: If you have a list with an inactive status, Horizon does not display the code. You must know the code of an inactive list to enter it in the Selection field.

4 If your library uses record ownership, use the drop-down list in the **Owned By** field to choose an owner for this workform.

5 If your library uses record ownership, use the drop-down list in the **Default Owner** field to choose an owner for any records created using this workform.

6 If you want only staff to see any bib records created with this workform, mark the **Staff Only** box.

7 Click **OK**.

8 Save your changes.

Creating or Editing a Selection List

When you create a selection list, you assign bib records to the selection list. You can use existing bib records, import bib records supplied by a vendor, or create new records yourself. You can create a variety of selection lists. (For example, you may want to set up selection lists of bib records for "Staff Favorites," "Borrower Requests," or suggested lists from a vendor.) You might also keep a selection list of titles that you do not plan to purchase immediately, but would like to consider for purchase in the future. You can search for any selection list that you create.

Neither staff members nor borrowers can search for the bib information for titles on a selection list unless you add the selection list search to your PAC or staff searching. Then borrowers and staff can search for and view selection lists and their titles. (For more information, see **Adding the Selection List Search to a PAC Flavor** on page 89.)

If you are importing bib records and want them all on the same selection list, you can put them on the selection list all at once when you import them. (For instructions, see **Importing Records** on page 235.)

If you have an existing bib record or want to create an individual bib record to add to a selection list, you can add the bib record individually to the selection list by using a Workform created for a specific selection list. (For instructions, see **Setting Up a Workform for Selections** on page 94.) You can also remove a title or assign a title to a different selection list through the Control Record.

Even though you can remove titles from a selection list, Horizon does not let you delete a selection list code from your system. Instead, you can change the status of the selection list to "Inactive." (For instructions, see **Changing the Status of a Selection List** on page 96.)

To create or edit a selection list

1 Open the bib record that you want to work with.

2 Choose **Marc, Show Control Record**, or click the **Record Status** icon (!).

3 Do one of these options:

- To add the title to a selection list, use the drop-down list in the **Selection** field to choose the selection list you want.
- To remove the title from the selection list, delete the code in the **Selection** field.

- To transfer the title from the selection list to another, change the code in the **Selection** field to the selection list that you want.

4 Click **OK**.

Horizon updates your selection lists.

Finding and Reviewing a Selection List

After you create a selection list, you can search for the selection list and review its titles if you know the selection list code.

To search for and review a selection list

1 Start a **New Search**.

To do this, press **F2** or find the process in the **Searching** folder on the navigation bar.

Horizon displays the Search window.

2 In the **Indexes** list, highlight the **Selection** search. (For instructions on adding the Selection List search, see **Adding the Selection List Search to a PAC Flavor** on page 89.)

3 Search for the selection code you want.

Horizon displays the titles that have been added to the selection list that you chose.

4 If you want to review the bib record associated with a title on the selection list, highlight the title and click **Show Detail**.

Changing the Status of a Selection List

You can change the status of a selection list. (For example, you may have a "Preliminary List" that you want to make "Active.") If you no longer use a specific selection list, you can change the selection list status to "Inactive." You can also have Horizon change the status to "Inactive" for you at a later date.

Keep the status of your selection lists updated so other staff members know which lists to work from. You can change the selection list status when you need to and from any record on the list. However, the change affects every item on the list.

Horizon does not let you delete a selection list code from your system. If you no longer want to use the list, change the status of the selection list to "Inactive." You can also delete all items from a selection list and reuse it.

(To change the status of a selection list, see **Creating or Updating a Selection List Code** on page 92.)

Copying a Bib Record

You can copy existing bib records. This is helpful when you want to add a new bib record that is different from an existing bib record in only one or two fields or subfields.

You copy the first record and edit the few areas that you want to change, and save the second copy as a new record. (For example, you can create a bib record for the second edition of a title by copying the record of its first edition. Then edit the few subfields where the information between the two editions differs.) When you copy a record, Horizon copies all the links from the original bib record, but it does not copy the copy and item records. You must attach any necessary copy and item records manually. (For instructions, see **Creating a Copy Record** on page 179 and **Creating Item Records** on page 143.)

To copy a bib record

1 Open the bib record that you want to copy.

2 Choose **File, Copy Record**.

Horizon displays both the original bib record and the newly created copy and displays “<new>” in the copy’s title bar.

Note: The duplicate bib record does not yet have a record number assigned to it. When you make changes to the record and save those changes, Horizon assigns a number to the new bib record.

3 Edit any fields requiring information that differs from the original. (For instructions, see **Editing Components of a MARC Record** on page 65.)

4 Save your changes.

Merging Bib Records

To maintain accurate records and help to keep your database cleaner, you can merge duplicate bib records for a given title. The bib record that you keep is called the “surviving” bib record. Any records that are merged into the surviving bib record are called “dying” bib records. Any item or copy records attached to the dying bib records attach to the surviving bib record. The surviving record also retains any of its own existing item and copy records.

Before you can merge records, your system administrator must set up merge profiles. (For instructions, see “Setting Up a Merge Profile” in the *Cataloging Setup Guide*.)

To merge bib records

1 Open the bib records that you want to merge.

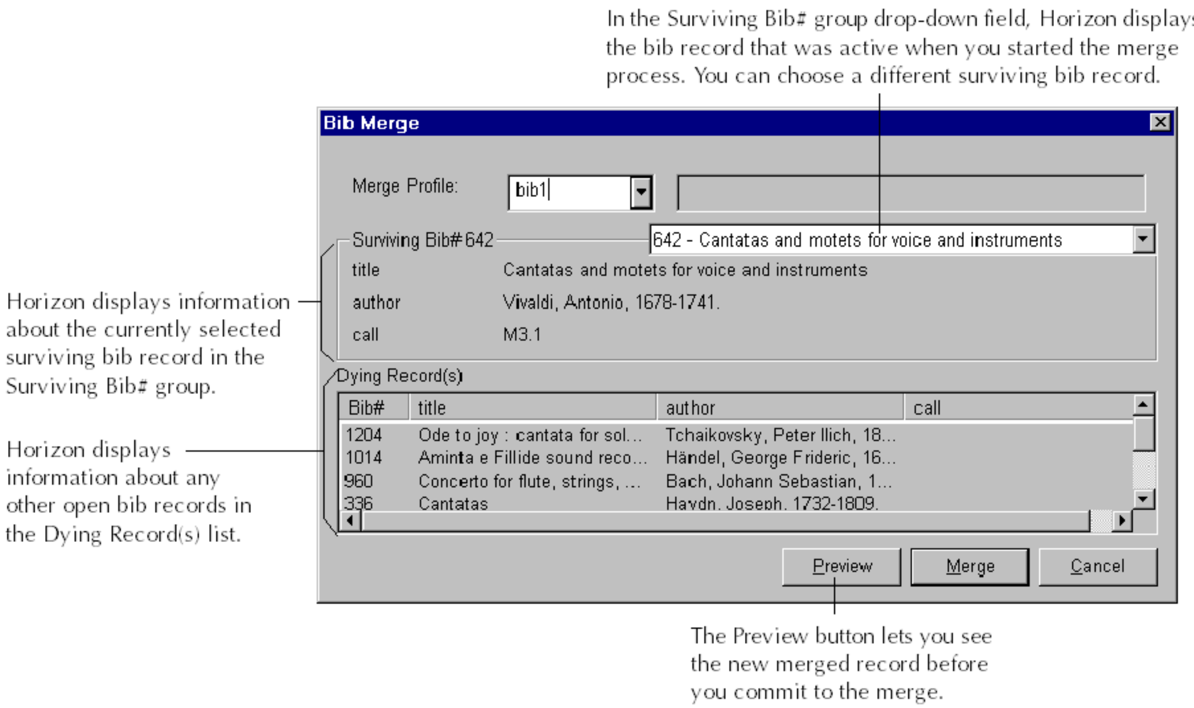
2 Choose **Marc, Merge Record**.

Horizon opens the Bib Merge dialog box and displays the numbers of the bib records that you have open.

3 Use the drop-down list in the **Merge Profile** field to choose the Merge Profile you want to use.

Note: If you have more than one Merge Profile defined, you can change the Merge Profile at any time before you perform the merge.

Horizon displays information about the records you have open:



4 If you want to choose a different surviving record, use the **Surviving Bib#** drop-down menu to choose the record that you want Horizon to keep.

5 In the **Dying Bib#** group, highlight the bib records that you want to merge into the surviving record.

6 Click **Preview** to view the surviving bib record before continuing with the merge.

Important: The merge process cannot be reversed. Be sure that you want to merge the records before you click Merge.

7 Make sure that the surviving bib record has all the information that you want to keep.

8 If there are tags in any dying bib records that you want to keep but that do not display in the preview of the surviving record, cut and paste them from the dying bib records into the surviving bib record.

You must do this in the existing record that you have chosen to survive, *not* in the merge preview window. (For instructions, see **Cutting, Copying, Pasting, and Deleting Information in a MARC Record** on page 65.)

9 Click **Merge**.

Horizon merges the dying records into the surviving record, attaches any item and copy records associated with the dying records to the surviving record, and deletes the dying records.

10 Save your changes.

Working with Linked Bib Records

Libraries often have bib records that should logically “go together.” (For example, a bib record of a translation title “goes with” the bib record of the original title.) You can link these bib records together by adding certain tags to the bib records. These tags are referred to as “Link Tags.”

Linking bib records lets users view and quickly access related titles when they do a catalog search. (For information, see “Viewing Related Works” in the “Searching” chapter of the *Horizon Basics Guide.*) Linking bib records may also result in a broader range of hits when users perform a keyword search. (For more information, see “Using Keyword Inheritances” in the “Working with Linking Tags” section of the *Cataloging Setup Guide*.)

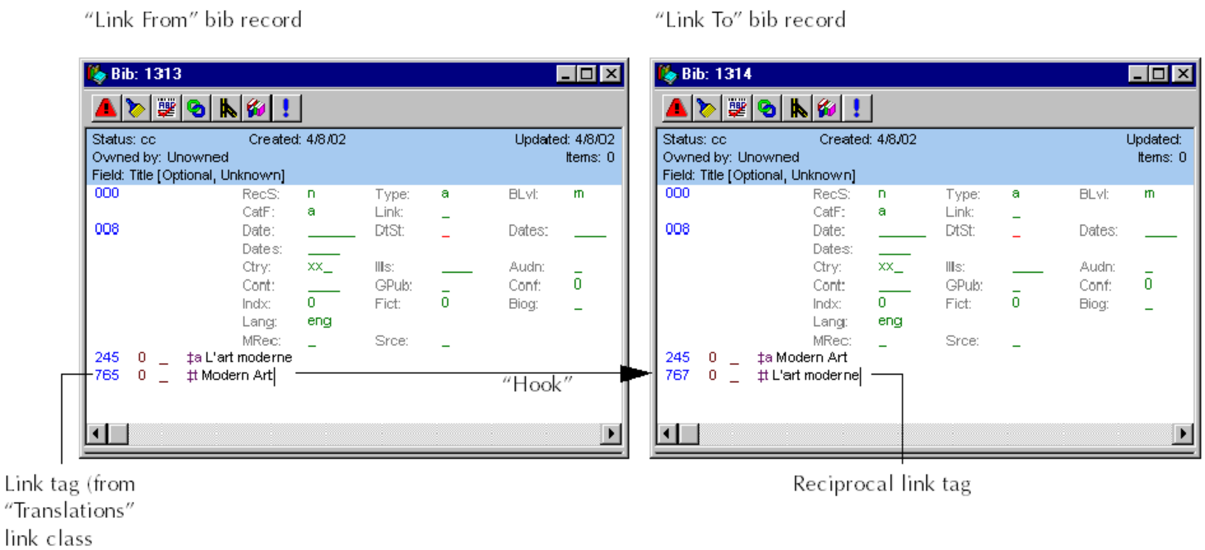
Linking bib records affects searches against your database only if the search mode in the PAC flavor is set to trace links. (For more information, see “Assigning a Search Mode to a PAC flavor” in the “Searching Setup” chapter of the *System Administration Guide*.)

Bib record links consist of these elements:

Element	Description
“Link From” bib	The bib record from which the link starts.
“Link To” bib	The bib record to which you want to link the first bib record. A “Link To” bib record is also referred to as the “hooked” bib record.
Link tag	The “hook” that links records together. Link tags display information about the record they are linked to. The link tag is made up of several subfields from different tags in the Link To bib record. (For example, a link tag may display the title and publication information of the bib record to which it links.)
Reciprocal link tag	The tag that Horizon adds to every “Link To” bib record. These tags show that the bib record is linked, or “hooked.” Like link tags, reciprocal link tags display information about the records that they are linked to. When you double-click on a reciprocal link tag, Horizon opens the Link From bib record.

MARC21 linking entry fields are tag numbers 76X through 78X. Each of these tags describes a specific relationship between the linking bib records. (For more information, see your MARC documentation or the Library of Congress web site at this address: http://www.loc.gov/marc/.) Your system administrator needs to set up linking before you can use this feature. (For instructions, see “Setting Up or Changing Tag Linking” and “Setting Up or Changing General Subfield Parameters” in the “Setting Up or Changing Valid MARC Record Components” section of the *Cataloging Setup Guide*.)

Here is an example of two linked bib records:



This section explains these topics:

- **Linking Bib Records** on page 100
- **Adding a Link Tag without Creating a Link** on page 106
- **Opening a Linked Bib Record from Another Linked Bib Record** on page 106
- **Editing a Link Tag in a Bib Record** on page 107
- **Breaking a Link between Bib Records** on page 107

Linking Bib Records

If you have only one record open, ways you can link bib records in one of these ways:

- **Manually add a link tag to the record.** After you add the tag, you can enter text to match an existing tag or use Browse Link to find the record you want to link to. If your system administrator has set up Browse Link, you can use it to get fast access to linkable records in your database. (For instructions, see “Setting Up Browse Link” in the *Cataloging Setup Guide*.) Horizon creates the link when you leave the field.
- **Use an import source.** An import source determines how Horizon handles records as you import them. This linking method uses the logic of link match

points inside an import source to automate bib-to-bib linking. (For more information, see **Understanding Import Sources** on page 236.) You choose an import source for bib-to-bib linking in the Customize Editor.

- **Copy a linked bib record**. When you want to link several records already linked to one record, you can copy and edit each record, keeping the links the same. (For instructions, see **Copying a Bib Record** on page 97.)

If you have multiple records open, you can use the linking techniques already described. You can also use these methods:

- **Use the Link command.** This method lets you link a single bib record to another single record, or a single bib record to multiple other bib records.
- **Copy and paste a link tag from one record to another**. Horizon keeps the original linkage type in every tag you paste. (For instructions on copying and pasting, see **Cutting, Copying, Pasting, and Deleting Information in a MARC Record** on page 65.)

Your system administrator can set restrictions on which links you can create. (For instructions, see "Prohibiting Bib Record Links" in the "Working with Linking Tags" section of the *Cataloging Setup Guide*.)

This section explains these topics:

Linking Bib Records by Adding a Link Tag

You can enter a link tag directly into the record.

To link bib records by adding a link tag

1 Open the bib record from which you want to create a link.

2 Do one of these options:

- Click your pointer anywhere in the record.
- If you want to position the new tag, click your pointer in the tag just above where you want the new tag to display.

Note: Your library's settings for tag sorting may affect your new tag's final position in the record.

3 Do one of these options:

To do this	Do this
Choose a tag from a list	1. Choose **Edit, Add Tag**, or right-click in the record and click **Add Tag** on the pop-up menu. Horizon opens the Select Tags to Add window. 2. Double-click the tag that you want to add. If you want Horizon to find the tag in the list, begin typing the number of the tag you want. Horizon inserts the tag and some valid subfields on the line below your insertion pointer.
Add a blank tag	1. Choose **Edit, Insert Tag**, or right-click in the record and click **Insert Tag** on the pop-up menu. Horizon inserts a blank tag just below your insertion pointer. The blank tag displays an underscore three characters wide to designate where you put the tag number and two underscores to designate the tag indicators. 2. Enter the tag number. **Note:** Horizon inserts some valid subfields. (For more information, see **Editing Components of a MARC Record** on page 65 and **Adding a Link Tag to a Bib Record** on page 50.)

4 Add subfields as needed. (For instructions, see **Adding a Subfield to a Tag** on page 62.)

Important: In bib-to-bib subfield linking, a link may break when you add a linking subfield to a link tag by inserting the subfield using (<ctrl> /).

To prevent data corruption, do not use the insert subfield function (<ctrl> /) when you add a linking subfield to a link tag. Use the add link function (<ctrl> u).

5 Do one of these options:

If this	Do this
You know the text that needs to go in the tag to create the link	1. Enter the text. This is the subfield text defined in the Link Match Points group of the Import Source. (For more information, see “Setting Up Link Match Points” in the “Setting Up Import Source Parameters” section of the *Cataloging Setup Guide*.) 2. Skip to step 7 of this task.

If this	Do this
Browse Link has been set up for the tag you are working with and you want to search for a record with which to link	1. Put your insertion pointer in the subfield where you want to create the link. 2. Begin entering the text that you want to use. 3. Choose **Edit, Link Options, Browse Link**. Horizon opens a search results window displaying headings that begin with the same text that you entered in the subfield from which you started the search. You can click **Show Titles** to see a list of titles associated with the entry. 4. Continue with step 6 of this task.

6 Do one of these options:

If this	Do this
You find the record you want	1. Highlight the record you want. 2. Click **Link**. Horizon completes the link between the bib records and enters the appropriate information in the tag or subfield from which you started the search. It also adds a reciprocal tag in the second bib record.
You do *not* find the record you want	1. Click **Cancel** to close the search results window. 2. Use another method to create your link. You may need to create an appropriate second bib record before you can continue. This task is finished.

7 Click **OK**.

8 Save your changes.

Horizon links the records as soon as you either leave the field or save the record, depending on the type of linking you have chosen and whether you have automatic linking set up.

Linking Bib Records by Using an Import Source

When you use an import source to link bib records, Horizon automatically finds the match and creates the link. The import source defines Link Match criteria so that when you enter text in one record, Horizon can use that text to find the record you want to link to. Before you can use an import source to link bib records, your system administrator must set up Link Match criteria. (For more information on import sources, see **Importing Records** on page 235. For more information about setting up

Cataloging Setup Guide.) You choose an import source for bib-to-bib linking on the Profile tab of the Customize Editor. (For more information, see **Changing Profile Options** on page 24.)

To link bib records by using an import source

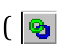
1. Open the bib record that you want to link.
2. Make sure that you have specified the import source that you want in Customize Editor. (For instructions, see **Choosing the Import Source for Bib-to-Bib Linking** on page 25.)
3. Add the linking tag that you want to use for the link.
4. Enter the appropriate match criterion (for example, you might match on the ISBN of the other record).
5. Leave the field.

   Horizon populates the “From” bib record and puts a tag in the “To” bib record, even though the “To” bib record is not open.
6. Save your changes.

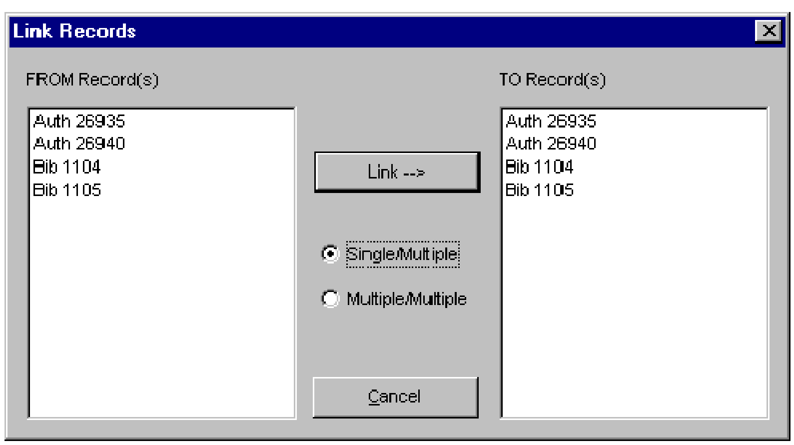
Linking Bib Records by Using the Link Command

You can use the Link command to link a single bib record to another single record, or a single bib record to multiple other bib records.

To link bib records by using the Link command

1. Open the bib records that you want to link.
2. Choose **Marc, Link Record**, or click the **Link** icon () in the toolbar.

   Horizon opens the Link Record dialog box with all the open records displayed in both columns:

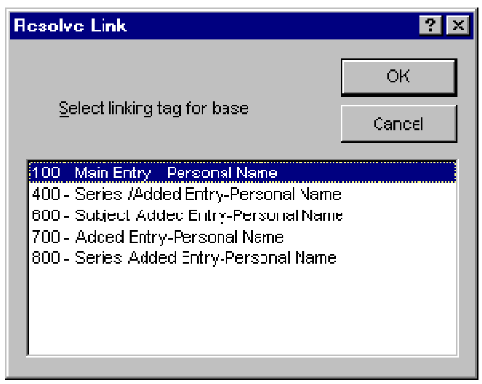


3. Do one of these options:

To do this	Do this
Link one bib to one bib	1. Mark **Single/Multiple**. 2. Highlight the bib record you want to link from in the **From Records** column. 3. Highlight the bib record you want to link to in the **To Records** column.
Link one bib to multiple bibs	1. Mark **Single/Multiple**. 2. In the **From Records** column, highlight the bib record number from which you want to link. 3. In the **To Records** column, highlight the bib record numbers to which you want to link. **Note:** When you mark Single/Multiple, Horizon lets you highlight multiple records in only one column.

4 Click **Link**.

If a tag can attach in more than one area (for example, the tag can attach as either a tag 772 or 773), Horizon opens the Resolve Link dialog box:



5 If necessary, double-click the tag that you want to use as the link tag.

Note: If a tag that you are trying to attach already exists in the bib record as a nonrepeatable tag, Horizon does not attach the tag. Instead, Horizon displays a message that explains why the tag cannot be attached.

6 Make sure that one of the bib records is the active window.

7 Save your changes in all open bib records.

Horizon inserts the new linking tags in their correct numeric order into the bib records you chose. You can cut and paste the new tags to move them to a position that you prefer, depending on how your tag action is set. (For instructions, see **Cutting, Copying, Pasting, and Deleting Information in a MARC Record** on page 65.)

Adding a Link Tag without Creating a Link

You can add link tags without creating a link between bib records. These are called "nonlinking bib records." (For example, if you own a bib record that links to another bib record not owned by your library, you can still create a link tag for the one you own. This link tag shows that another bib record is related to the one you own, although it is not housed at your library.)

If you search your database for the title that has been nonlinked, the Bibliographic Detail window for that title lists the related title. However, no more information is available for the related title because your library does not own it.

After you add a link tag without creating a link, you need to manually enter the information that you want displayed in the link tag.

To add a link tag without creating a link

1 Open the bib record in which you want to insert a link tag without creating a link.

2 Add a non-linking tag. (For instructions, see **Adding a Non-Linking Tag to a Record** on page 49.)

Note: You can add any tag number that you want, but you should use tag numbers that do not conflict with Library of Congress, OCLC, or other established rules. Traditionally, tags 76X through 78X and 973 have been used as link tags in Horizon.

3 Enter the information that you want to display in the link tag.

4 Save your changes.

If you have no bib record that matches the information you enter, Horizon cannot link the record. The tag remains unlinked but displays the necessary information until you add a record that matches it.

Opening a Linked Bib Record from Another Linked Bib Record

You can open linked bib records as you would other bib records. (For instructions, see See "Finding and Opening an Existing Bib Record".) You can also open them from other linked bib records.

Link tags that are "nonlinked" do not open a record. This is because the records have no real link between them.

To open a linked bib record from another linked bib record

1 Open a bib record that has a linking tag.

2 Double-click the link tag or reciprocal link tag.

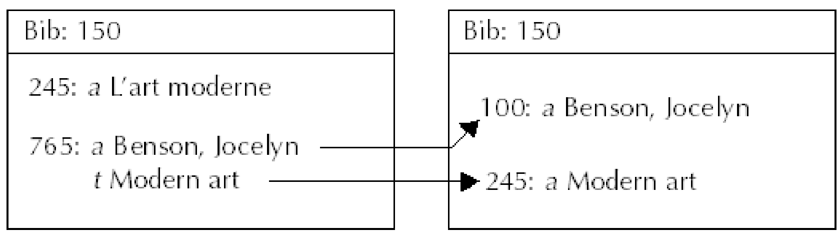
Note: Traditionally, tags 76X through 78X and 973 have been used as link tags in Horizon.

Horizon opens the bib record to which the tag links. (For example, if you double-click the link tag in the Link From bib record, Horizon opens the Link To bib record. If you double-click the reciprocal link tag in the Link To bib record, Horizon opens the Link From bib record.)

Editing a Link Tag in a Bib Record

You can edit most parts of a linked bib record as you would edit any MARC record. However, if you edit a linked or reciprocal tag directly—in the bib record that displays only the linking tag—you break the original link. This is because the information in a link tag or reciprocal link tag comes from tags in the record it links to, so it “belongs” to the other record.

If you want to edit the information in a link tag or reciprocal link tag without breaking the link, you must edit the tag in the record to which the tag belongs. When you do this, all the bib records linked to it reflect those changes:



Subfield *a* in the 765 link tag “belongs to” the 100 tag in the linked bib record. Subfield *t* “belongs to” tag 245. To edit subfields *a* and *t*, edit the 100 tag and 245 tag.

To edit a link tag in a bib record

1. Open the bib record that has the link tag or reciprocal link tag that you want to edit.
2. Double-click the link tag or reciprocal link tag that you want to edit.

   Horizon opens the record that contains the tag.
3. Edit the information in the record.
4. Save your changes.
5. Save the bib record that you opened in step 1 to see the changes that you made.

Breaking a Link between Bib Records

You can break links between bib records in these ways:

- **Deleting a link tag.** You can delete a link tag as you would delete any MARC field. When you delete a link tag, Horizon removes any reciprocal link tags from linked bib records. (For information on deleting link tags, see **Cutting, Copying, Pasting, and Deleting Information in a MARC Record** on page 65.)

- **Deleting a linked bib record.** You should delete a linked bib record only if you no longer need the bib record. When you delete a linked bib record, Horizon deletes reciprocal link tags in linked bib records. (For information on deleting linked bib records, see **Deleting a Bib Record** on page 108.)
- **Editing a linked tag or subfield in the "link from" bib record.** (For more information, see **Editing a Link Tag in a Bib Record** on page 107.)
- **Using the Unlink command.** This leaves the tag in the record so that the information in it is not lost, but the tag does not link to anything. (For instructions, see **Breaking a Link Using the Unlink Command** on page 60.)

Deleting a Bib Record

You can delete a bib record if you no longer need it.

Effects

- If a bib record that you want to delete contains the last reference to a system-generated authority record, deleting that bib record simultaneously deletes the authority record.
- When you delete a bib record, Horizon also deletes any hold requests for the deleted title and notifies the borrower that the item is no longer available. You can reassign the hold requests before you delete the bib record. (For instructions, see **Reassigning a Borrower Hold Request** on page 109.)
- If you delete a bib record that is linked to another bib record, Horizon removes any reciprocal link tags from the remaining bib records.

Constraints

- You cannot delete a bib record that has item records, serial copies, or lines of a purchase order attached to it.

To delete a bib record

1 Open the bib record that you want to delete.

2 Make sure that no item records are attached to the record.

The upper-right corner shows "Items." If items exist, you must first delete them or link them to another bib record. (For instructions, see **Deleting a Single Item Record** on page 157.)

3 Choose **File, Delete Record.**

Horizon displays a message asking if it is OK to delete the record.

4 Click **Yes.**

The message box closes and Horizon deletes the record.

Reassigning a Borrower Hold Request

If a borrower has made a hold request on a title, you can assign that hold request to another title. You may want to do this if you need to delete a bib record but you want to keep the requests that are linked to that record.

When you reassign or transfer a hold request from one title to another, Horizon checks to make sure that there is an item on the destination title that can be requested and checked out by a borrower. Horizon then checks any requests being transferred against each item in the destination title and makes the appropriate transfers.

Effects

- If the destination title has no requests, Horizon transfers the requests.
- If the destination title already has requests on it, Horizon merges the requests that are being transferred into the existing request list by date and time.
- If a borrower has a request on both the title that you are transferring requests to and the destination title, Horizon deletes the duplicate request.

Constraints

If the destination title does not have an item that can be requested, Horizon cannot transfer the request.

This section explains these topics:

- **Setting Up the Transfer Request Queue Display** on page 109
- **Transferring a Hold Request from One Title to Another** on page 110

Setting Up the Transfer Request Queue Display

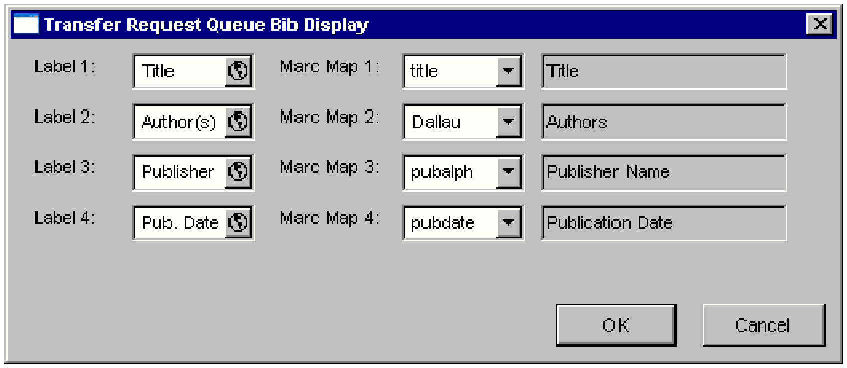
To make sure that you transfer requests to and from the correct titles, Horizon lets you choose up to four fields of data to display from the bib record. Horizon also lets you choose the MARC map that you want to use to display the data. Once you choose these settings, Horizon keeps them until you change them.

To set up the Transfer Request Queue display

1. Start the **Transfer Request Queue Bib Display** process.

   The default location of this process is the **Circulation\Circulation Control Menu** folder on the navigation bar.

   Horizon displays the Transfer Request Queue Bib Display window:



2 Use the **Label** and **MARC Map** drop-down lists to choose the bib information that you want to use to identify matching bib records.

When you transfer requests, this information displays on the Transfer Request Queue window.

3 Click **OK** to save your changes.

Transferring a Hold Request from One Title to Another

When you transfer requests from one title to another, Horizon lets you load both the title that has the requests you want to transfer and the destination title. Then Horizon displays the information about the titles that you specified when you set up the Transfer Request Queue Bib Display. This lets you verify that Horizon transfers the request to the correct bib record. You can choose whether to transfer item-specific requests.

Effects

Horizon changes item-level requests to bib-level requests.

Constraints

Horizon can only transfer requests between items of the same item type. (For example, you cannot transfer requests from a video to a book of the same title. You can only transfer requests from a video to another video or a book to another book of the same title.)

To transfer a hold request from one title to another

1 Start the **Transfer Request Queue** process.

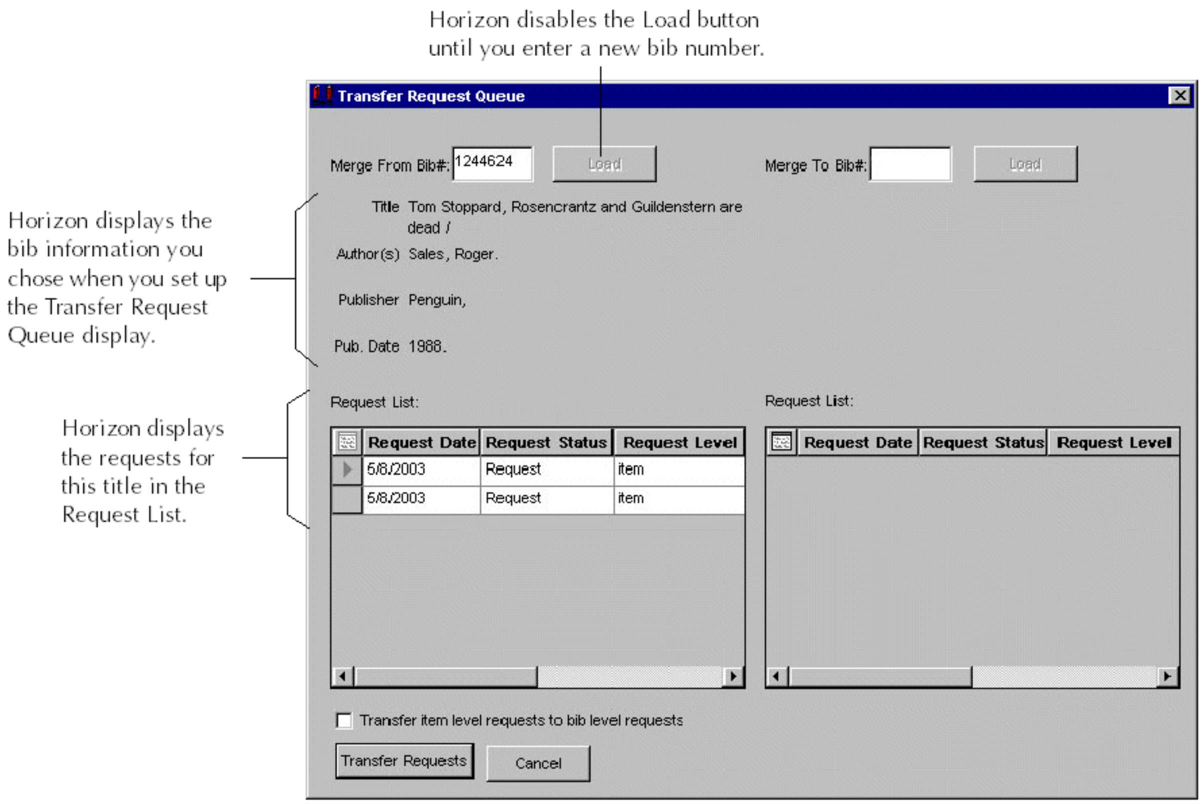
The default location of this process is the **Circulation\Circulation Control Menu** folder on the navigation bar.

Horizon displays the Transfer Request Queue window.

2 In the **Merge From Bib#** field, enter the bib number of the title whose requests you want to transfer.

3 Click **Load**.

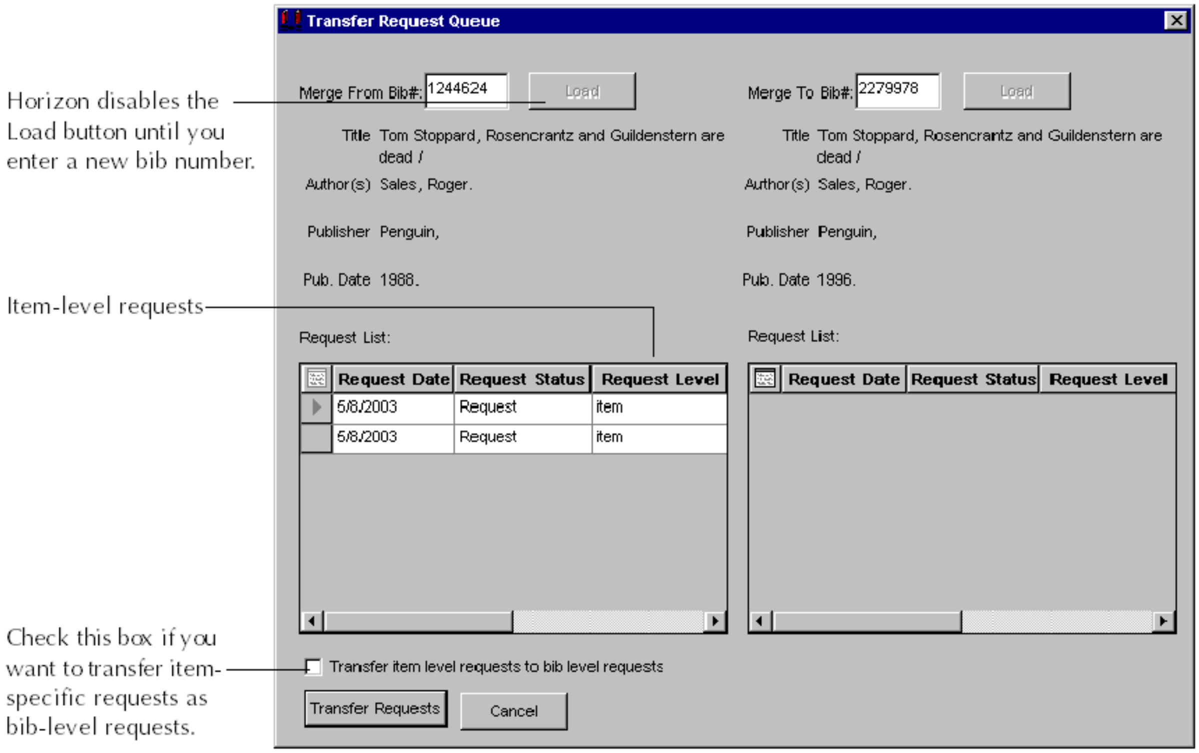
Horizon displays the bib information and the request queue for the bib record number that you entered in the *left* Request List window:



4 In the **Merge To Bib#** field, enter the bib number of the title to which you want to transfer the requests.

5 Click **Load.**

Horizon displays the bib information and the request queue for the bib record number that you entered in the *right* Request List window:



6 If you want to transfer item-specific requests and make them bib-level requests, mark the **Transfer item level requests to bib level requests** box.

7 Click **Transfer Requests**.

Horizon transfers the requests and displays them in the destination Request List, sorted by date.

If Horizon could not transfer all of the requests, Horizon displays this message: “Transfer is complete. Only requests with a status of ‘Request’ and which can be filled on the destination bib were transferred.”

8 Repeat steps 2 through 7 if you want to transfer more requests.

9 Click **Cancel** to close the Transfer Request Queue process.

Chapter 5: Authority Records

This chapter explains how to create and use authority records. It also explains how to change authority headings, merge authorities, create and delete cross-references, and create and use uniform titles.

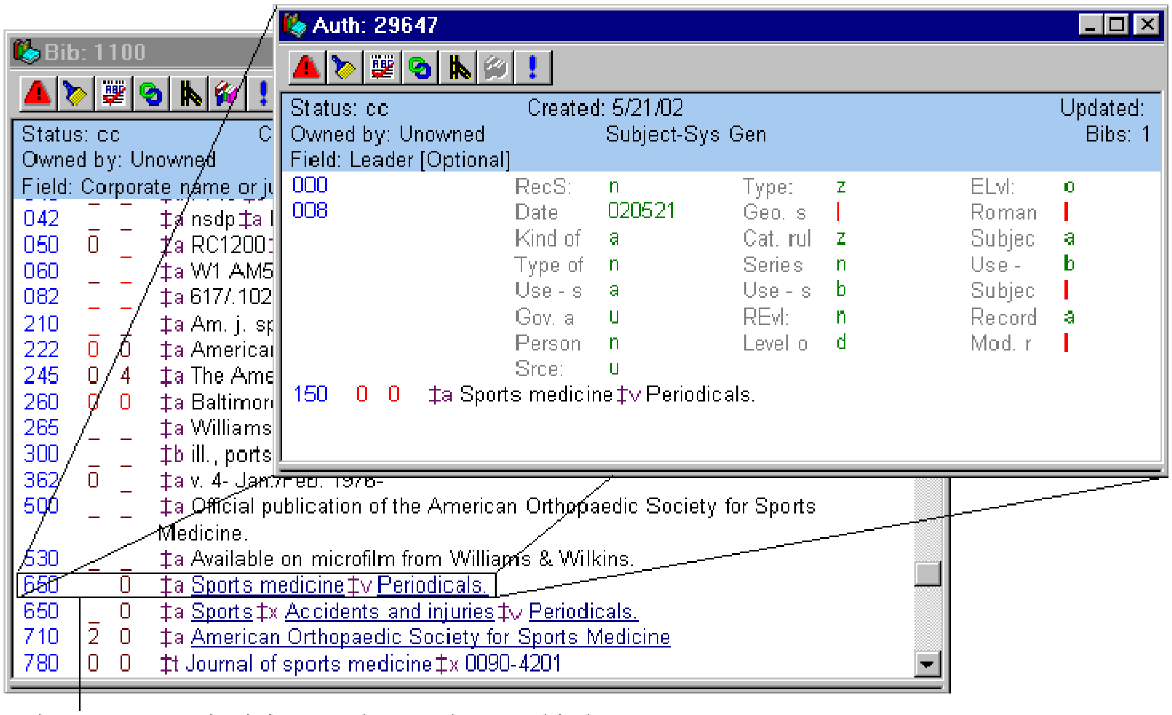
This chapter contains these sections:

About Authority Records

Certain tags and subfields in a MARC record contain data used for searching—such as author, subject, and series—where uniform entries are important for accuracy and consistency. To make sure that these entries are uniform throughout the database, Horizon controls these tags and subfields, referred to as authority-controlled tags or subfields.

Horizon stores each authority-controlled tag (complete with any appropriate subfields) in a separate MARC record called an "authority record." Only one authority record should exist for each authority entry. This authority record is then linked to all the bib records that display information that the authority record contains. (For example, Isaac Asimov wrote hundreds of books. Isaac Asimov as an author should have only one authority record in a database, while each of his titles has a bib record that points to Isaac Asimov as the author.) Authority records can also be linked to other authority records.

Because Horizon stores authority records separately from bib records, you can maintain authority records separately. This diagram illustrates the separate existence of authority and bib records and the way that authority records are linked to bib records:



The 650 tag in the bib record is a subject-added entry. It displays the subject information contained in the attached authority record. Any bib record that uses the same subject-added entry links to the same authority record.

Sometimes Horizon generates an authority record. A system-generated record is not a full MARC authority record. Horizon creates these records in this way:

- Generates the main heading tag number based on the bib tag, the *See Also* tag, or the *See* tag.
- Copies the non-filing indicator, if it is defined for both the link from tag and the link to tag.
- Sets other indicators to the default indicator value for the specific indicator number, based on the link to tag number.
- Generates the text of the heading based on the subfields in the link from tag that are defined to be controlled, or linking, subfields.
- Copies punctuation from the link-from tag for each subfield, regardless of how the punctuation should be handled based on matham settings.
- Saves the use code set based on the link from type (author, subject, or series).
- If the link from is a Subject type authority, places the subject scheme into the generated record.
- If the system-generated record is created from a *See Also* reference, places a reciprocal *See Also* reference into the system-generated record that links back to the original record.

Horizon handles some changes to system-generated authority records in specific ways:

- If the system-generated record is valid for an author and a matching heading is imported that is valid as a subject, Horizon changes the system-generated authority to valid for both author and subject. Then Horizon updates the subject scheme.
- If the system-generated authority is valid as a subject and a matching author heading is imported, it links to the system-generated record and Horizon sets the system-generated record as valid for both author and subject.
- If the last reference to the system-generated record is deleted, the system-generated record is deleted.
- If any manual change is made to the MARC data using the MARC Editor, Horizon no longer considers the authority record to be system-generated. The cataloger must either complete the record or find a complete matching authority to import and overlay the incomplete authority record that resulted from the manual change.

System-generated authority records function as placeholders that Horizon uses for several purposes:

- **To let Horizon index and search on headings**. When Horizon imports a bib record with an authority tag that is new to the library's database, Horizon generates an authority record. Horizon can use this record for indexing in a browse or keyword index. This lets borrowers and staff search that authority and find the bibs that reference that authority.
- **To let Horizon search on a *See Also* reference in an authority record**. When Horizon creates a system-generated *See Also* record, searching on the *See Also* heading displays another line in the search results (for example, "Related Author" or "Related Subject") that shows the related heading.
- **To let Horizon search on a See reference in an authority record**. When Horizon creates this type of system-generated authority record, the record is marked "invalid." Horizon's search results display an "Author Is," "Subject is," or "Series is" heading that points to the valid form of the heading. You cannot make changes to an invalid authority record.
- **To let multiple references to a heading link to a single authority record**. Once Horizon creates a system-generated authority record, any new references created in Horizon link to that record. New references can come from either importing or manual cataloging. References can come from a bib record, a *See Also* reference (for a valid heading), or from a *See* reference (for an invalid heading).
- **To offer match and overlay points for importing of the full authority record**. Importing the full authority record will overlay the system-generated authority record.

You maintain authority records under a variety of circumstances, depending on the cataloging standards your library has set. Some of these circumstances include:

- Editing an authority record while working with a bib record that contains a reference to that authority

- Updating an authority record when the source (such as Library of Congress) changes that authority
- Creating a new authority record if your catalog does not yet contain the authority
- Merging duplicate authority records
- Deleting outdated or otherwise unused authorities from your library's catalog

Creating an Authority Record

An authority record is the source of information about a specific author, subject, or series name. Every bib record that refers to a specific piece of information should link to the authority record where that information is found. This can help keep your database more organized, and can help borrowers find information more easily.

Since authority-controlled tags follow a certain format and contain specific information, you should try to link to an existing authority in your database before you create a new one. Depending on the link type you have chosen, Horizon may do this for you automatically. (For more information, see **Choosing the Default Authority Link Type** on page 20.) If Horizon does not create automatic links, you can search for a tag from an existing heading and, if you find one that you want, you can send it to the MARC Editor and link it to the bib record. (For instructions, see **Adding an Authority-Controlled Tag** on page 50.)

You can also create an authority record using a workform. If you have an existing nonlinked linking tag and create an authority tag using a workform, Horizon can link the tag for you when you save the new authority record if you have Link on Match chosen as the link type. If you have chosen Never Link, you must link the record yourself. (For more information, see **Linking Authority-Controlled Records to Bib Records** on page 57.)

You can create both MARC and non-MARC authority records using a workform. (For instructions, see **Creating a New MARC Record** on page 45.) You must create workforms before you can create new records. (For instructions, see **Creating a MARC Workform** on page 217 and **Creating a Non-MARC Workform** on page 221.)

If needed, you can be taken directly to external help for defining MARC tags. (For instructions on using external MARC help links, see **Using Catalog Context Links** on page 48.)

Finding and Opening an Authority Record

You must open an authority record to edit the record if its information is outdated or if new information needs to be added to it.

You can edit information from within an authority-controlled tag in a bib or authority record, but this causes Horizon to break the link and create a new authority record containing the new information. Then Horizon links the bib or authority record you are editing to the new authority record. The original authority record no longer controls the tag you are editing. (For more information, see **Editing Authority Records** on page 119.)

This section explains these topics:

- **Opening an Authority Record Using Its Number** on page 117
- **Opening an Authority Record through Linked Bib/Authority Record** on page 117
- **Using Staff Searching to Find an Authority Record** on page 118

Opening an Authority Record Using Its Number

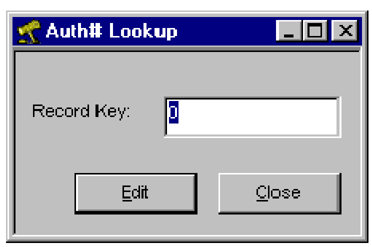
When you add records to your catalog either manually or automatically (by importing), Horizon assigns each record a sequential number. (Horizon posts this number in the upper-left corner of the authority record.) If you know this number, you can use it to open an authority record.

To open an authority record using its number

1 Start the **Auth# Lookup** process.

The default location of this process is the **Cataloging\Authority Record** folder on the navigation bar.

Horizon displays the Auth# Lookup dialog box:



2 Enter the Authority number in the **Record Key** field.

3 Click **Edit.**

Opening an Authority Record through Linked Bib/Authority Record

You can open an authority record through an authority-controlled tag in a bib or authority record.

To open an authority record through a linked bib or authority record

1 Open a MARC record that includes a link to an authority record.

2 Double-click the link to the authority that you want to open.

Horizon opens the authority record.

Using Staff Searching to Find an Authority Record

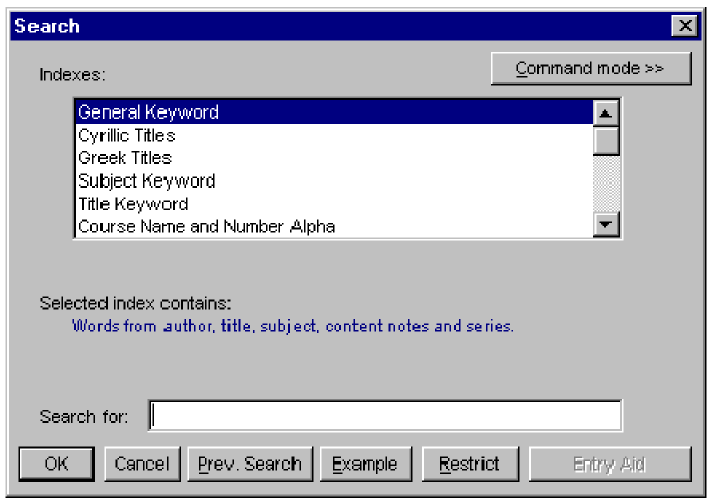
You can use staff searching to find an authority record and send it to the MARC Editor.

To use staff searching to find an authority record

1 Start the **New Search** process.

The default location of this process is the **Searching** folder on the navigation bar.

Horizon displays the Search window:



2 In the **Indexes** box, highlight an authority-controlled index that matches the type of authority you want to find.

3 Enter the search term that you want.

4 Continue with the search until the system displays a Bibliographic Detail window.

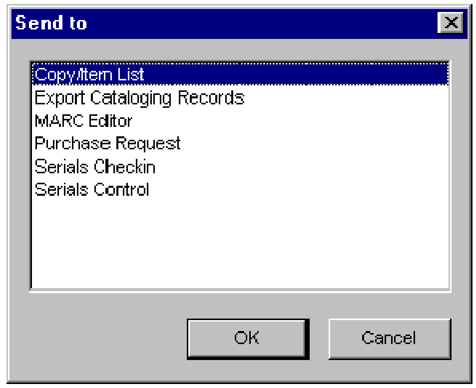
5 Double-click the authority that you want.

Horizon displays a Related Works window.

6 Highlight the authority that you want from the list.

7 Choose **Edit, Send to**, or click the Send to icon ().

Horizon displays the Send to dialog box:



8 Highlight **MARC Editor**.

9 Click **OK**.

Horizon opens the record in the MARC Editor.

Editing Authority Records

You can edit authority records by changing either a single record or by changing several similar records at the same time. Any changes that you make to an authority record affects all bib records associated with it. While you are editing, be sure that you do not create a new authority record that is the same as an existing authority record. Search for the authority record in your database to make sure. (For instructions, see **Using Staff Searching to Find an Authority Record** on page 118.)

This section explains these topics:

- **Editing a Single Authority Record** on page 119
- **Globally Changing Authority Headings** on page 119

Editing a Single Authority Record

You edit an authority record in one of two ways:

- As an authority record

  (For information on editing a record, see **Editing a MARC Record** on page 63.)

- As a tag or subfield in a bib or other authority record

  (For more information on editing a tag, see **Adding a Component to a MARC Record** on page 48.)

Globally Changing Authority Headings

Each time you change an authority heading, Horizon automatically updates all bib records that are associated with that authority record. Horizon lets you change several similar authority headings at a time to make them all contain the same information.

For example, with one step, you can change subject headings like these:

- Painting, Shinto
- Painting, Shinto - Japan

To the Library of Congress standard:

- Shinto Painting
- Shinto Painting - Japan

This is called globally changing authority headings.

Only authority records for which you have sufficient rights (even if ownership is listed with someone else) change when you use global change. Horizon reports the authority records that do not change. This lets you contact your system administrator to extend your rights or change those records that you cannot change.

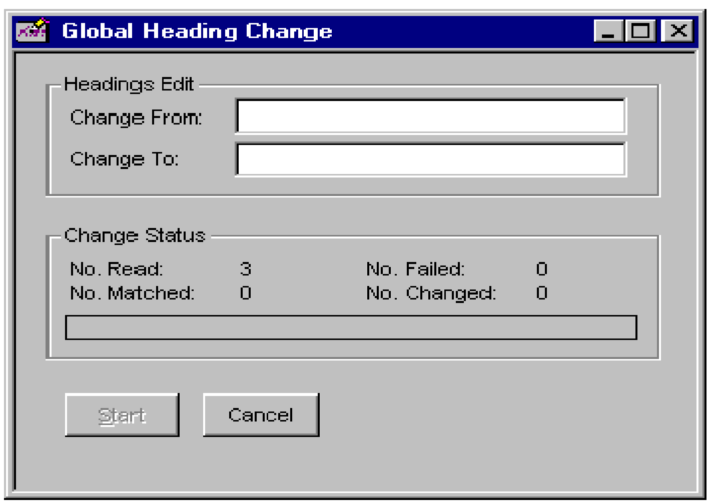
The rights on the associated bib records do not affect this function.

To globally change authority headings

1 Start the **New Search** process.

The default location of this process is the **Searching** folder on the navigation bar.

Horizon displays the Search window:



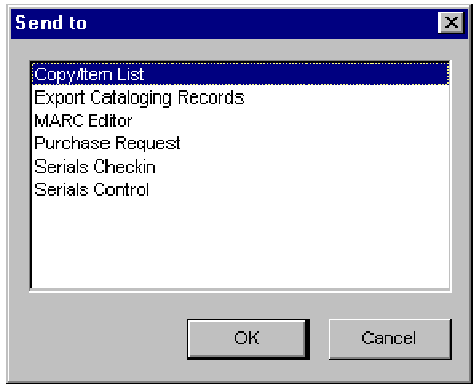
2 Search for the authority records that you want to change. (For instructions, see **Using Staff Searching to Find an Authority Record** on page 118.)

Note: To conduct an authority search, you need to use authority search indexes, such as Subject Keyword, Author Alphabetical, Subject Alphabetical, or Series Alphabetical.

3 In the search results window, highlight all the authorities that you want to change.

4 Choose **Edit, Send to**, or click the Send to icon ( ).

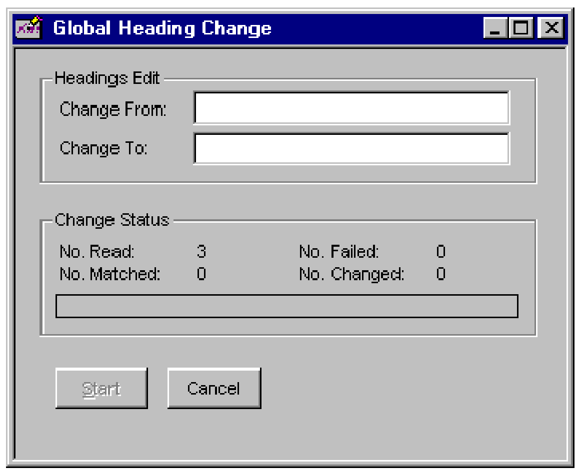
Horizon displays the Send to dialog box:



5 Highlight **Global Auth Change**.

6 Click **OK**.

Horizon displays the Global Heading Change dialog box:



7 In the **Change From** field, enter the part of the heading that you want to change.

The field is case-sensitive. Enter information exactly as it displays in a search results window.

8 In the **Change To** field, enter the new information.

The field is case-sensitive. Enter information exactly as you want it to display in a search results window.

9 Click **Start**.

The color bar in the Change Status group lengthens as Horizon searches for the authorities that you specified. As the search progresses, Horizon displays the number of authorities that are read, the number that match your request, and the number that are changed.

Merging Authority Records

You can merge authority records to remove duplicates from your system. (For example, if two authority records exist for the author C. S. Lewis, one containing the form “Lewis, Clive Staples,” and the other containing “Lewis, C. S.,” you can merge the two authority records into a single valid record.) All associated bib records link to the single remaining authority record. The authority record that you keep in your database is called the “surviving” authority record. The ones that are merged into the surviving authority record are called “dying” authority records.

Before you can merge records, your system administrator must set up merge profiles. (For more information about setting up merge profiles, see “Setting Up Merge Profiles” in the *Cataloging Setup Guide*.)

To merge authority records

1 Open the authority records that you want to merge.

2 Choose **Marc, Merge Record**.

Horizon opens the Auth Merge dialog box and displays the numbers of the authority records that you have open.

3 Use the drop-down list in the **Merge Profile** field to choose the Merge Profile you want to use.

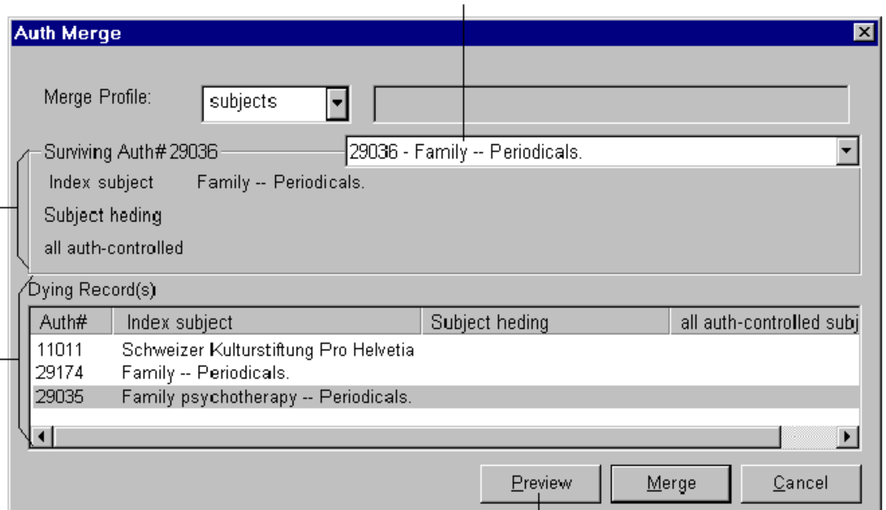
Note: If you have more than one Merge Profile defined, you can change the Merge Profile at any time before you perform the merge.

Horizon displays information about the records you have open:

In the Surviving Auth# group drop-down field, Horizon displays the authority that was active when you started the merge process. You can choose a different surviving authority record.

Horizon displays information about the currently selected surviving authority record in the Surviving Auth# group.

Horizon displays information about any other open authority records in the Dying Record(s) list.



The Preview button lets you see the new merged record before you commit to the merge.

4 If you want to choose a different surviving record, use the **Surviving Auth#** drop-down menu to choose the record that you want Horizon to keep.

5 In the **Dying Auth#** group, highlight the authority records that you want to merge into the surviving record.

6 Click **Preview** to view the surviving authority record before continuing with the merge.

Important: The merge process cannot be reversed. Be sure that you want to merge the records before you click Merge.

7 Make sure that the surviving authority record has all the information that you want to keep.

8 If there are tags in any dying authority records that you want to keep but that do not display in the preview of the surviving record, cut and paste them from the dying authority records into the surviving authority record.

You must do this in the existing record that you have chosen to survive, not the merge preview window. (For instructions, see **Cutting, Copying, Pasting, and Deleting Information in a MARC Record** on page 65.)

9 Click **Merge**.

Horizon merges the dying records into the surviving record, links any bib records associated with the dying records to the surviving record, and deletes the dying records.

10 Save your changes.

Clearing the New Authority Table

When you create or import authorities, Horizon keeps track of new authority records in an authority list called the new authority table. You can view lists of new authors, new subjects, or new series from the New Additions menu, which draws from this table. (The default location of New Additions is the Searching folder on the navigation bar.) You should clear this list periodically, particularly under these circumstances:

- After you merge authorities, clear the list to reflect only the remaining authority.
- After you create or import many authorities, clear the list to keep it from becoming too long.
- When time has passed and you no longer consider the items to be new additions, clear the list.

To clear the New Authority table

1 Start the **Clear New Auth Table** process.

The default location of this process is the **Cataloging\Authority Record** folder on the navigation bar.

Horizon displays this dialog box:

2 Click **OK**.

Horizon clears all new authorities in the New Authors list, New Series list, and New Subjects list in staff searching. If you have the list open while you clear it out, you need to redisplay the list to see the change.

Working with Cross-References

Cross-references help users find related titles as well as those titles that they search for directly. You can create cross-references at any time or delete cross-references that you no longer want. Your system administrator can determine which tags can be cross-references, and whether those cross-reference links are reciprocal (whether the links go both ways). In addition, your system administrator can set up Horizon so that information in any local subfields that you create is retained.

This section explains these topics:

- **Creating a Cross-Reference** on page 124
- **Deleting a Cross-Reference** on page 127

Creating a Cross-Reference

To help users locate all the titles related to a subject, author, or series, you can create cross-reference authority records. These cross-references display related headings in search results screens.

MARC distinguishes between two types of cross-references:

- *See Also* references
- *See* references

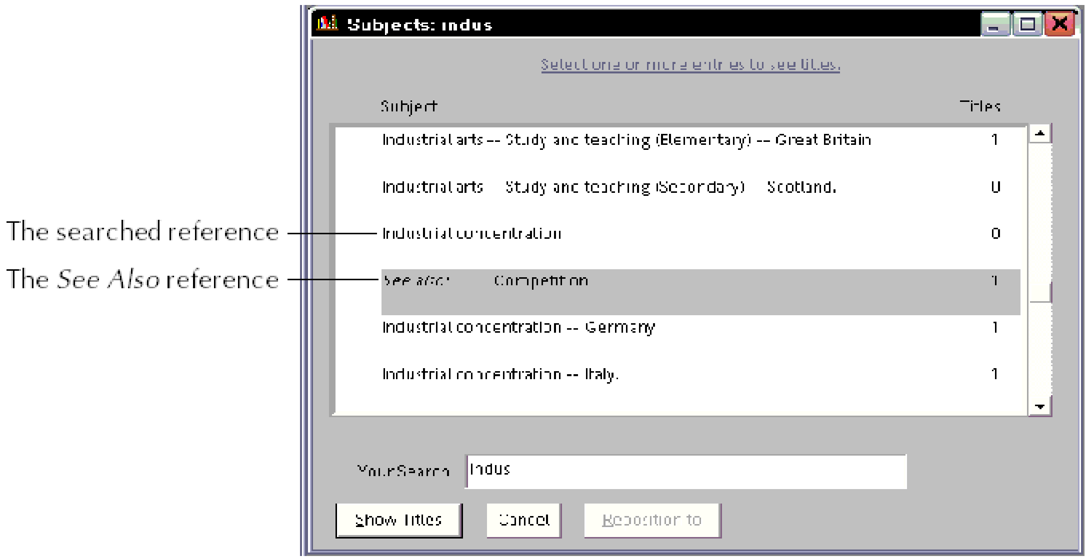
This section explains these topics:

- **Creating a See Also Reference** on page 124
- **Creating a See Reference** on page 126

Creating a *See Also* Reference

See Also references are also referred to as "*See Also From* tracings." *See Also* references direct you from valid authority forms to other valid authority forms. (For example, if you search for the subject "birds," you might see a PAC or staff searching authority list window that shows a valid related heading for "ornithology.")

See Also references can exist for any authority—author, subject, or series. Your library should establish guidelines by which you create *See Also* references. Here is an example of what a *See Also* reference looks like in a search results screen:



You can create *See also* references in two ways. This section explains these topics:

- **Creating a See Also Reference Automatically** on page 125
- **Creating a See Also Reference Manually** on page 126

Creating a See Also Reference Automatically

You can create a *See Also* reference manually by linking one valid authority to another. You can choose whether you want to create a two-way link (with two *See Also* references) or a one-way link.

A two-way link displays a *See Also* cross-reference on a search results screen for either authority heading. A one-way link displays a *See Also* reference for only the authority heading that you specify.

To create a *See Also* reference manually

1. Open the two authority records that you want to work with to create a *See Also* reference. (For instructions, see **Finding and Opening an Authority Record** on page 116.)
2. Make sure that the authority record that you want to be the primary record is the active record.
3. Choose **Marc, Link Record**, or click the **Link** icon ( ) in the toolbar.

   Horizon opens the Resolve Link dialog box.
4. Double-click the appropriate 5XX linking tag.

5 If Horizon displays a dialog box that asks if you want to create reciprocal links, do one of these options:

- Click **Yes**.

  Horizon inserts a cross-reference (5XX) tag in the primary record. When you save the primary record, Horizon inserts a cross-reference tag in the secondary record. Each cross-reference tag contains the authority heading from the other authority record.

- Click **No**.

  Horizon inserts a cross-reference (5XX) tag in only the primary record. The cross-reference tag contains the authority heading from the secondary authority record.

6 Save your changes.

Creating a See Also Reference Manually

Horizon automatically creates a *See Also* reference in your database when you import an authority record that has a *See Also* reference. If no authority exists that matches the incoming *See Also* reference, Horizon creates a system-generated authority record. Both the system-generated authority record and the imported authority record contain *See Also* references to each other.

On the other hand, if you import an authority record that has a *See Also* reference that matches an authority record in your database (and that authority record is not system-generated), Horizon creates a *See Also* reference to that authority record, but not a reciprocal *See Also* reference. This prevents *See Also* references that should not exist.

For example, the author “Stephen Leacock” might have a *See Also* reference to the subject “Canadian Authors.” If you create a reciprocal reference for both authorities, “Canadian Authors” would contain a *See Also* reference to Stephen Leacock, which should not exist. Therefore, when both authority records are imported into your database, Stephen Leacock references “Canadian Authors,” but not vice versa.

Creating a *See* Reference

See references are also referred to as “*See From* tracings.” *See* references direct you from nonstandard forms of an authority to its standard form. *See* references make sure that when you search on an unauthorized but commonly used form of an authority, you locate the authorized form and the associated titles.

See references might include these types of references:

- Maiden names (Jennifer Jones *see* Jennifer Jones Hannigan)
- Abbreviations (ALA *see* American Library Association)
- Acronyms (UNESCO *see* United Nations Educational Scientific and Cultural Organization)
- Pseudonyms (Clemens *see* Twain)
- Changed forms of Library of Congress Headings

Always follow your library's cataloging rules in establishing correct authority forms to determine which invalid forms require *See* references.

When you create a *See* reference, you add a *See From* tracing tag to a valid authority record and enter the invalid term in the *See From* tracing tag. You can also attach an invalid form to a valid form. Both methods create a one-way link from an invalid to a valid authority.

To create a *See* reference

1. Open the valid authority record for which you want to create a *See* reference. (For instructions, see **Finding and Opening an Authority Record** on page 116.)
2. Add the appropriate *See* tracing tag. (For instructions, see **Adding a Component to a MARC Record** on page 48.)

   Note: *See From* tracings have 4XX tags.
3. Enter the invalid form for the authority.
4. Save your changes.

Deleting a Cross-Reference

You can delete *See Also* and *See* cross-references. If you delete a *See Also* tag, Horizon breaks the link between the two authority records. If you delete a *See* tag, Horizon deletes the invalid authority from the authority file.

To delete a cross-reference

1. Open the authority record that contains the cross-reference.
2. Highlight the cross-reference tag.
3. Choose **Edit, Delete Tag**.

   Horizon removes the *See* or the *See Also* reference tag from the record.
4. Save your changes.

Working with Uniform Titles

In Horizon, you can design an authority record that combines a specific title and its author information into one searchable unit. A borrower can then locate the item as a single "hit" during a PAC search.

For example, if you searched for Karl Shapiro's *Selected Poems* and conducted a Title Alphabetical search on "selected poems," Horizon would display several hits from various authors. However, if you conducted a uniform title search on "selected poems," you could see both "Selected Poems" and "Selected Poems--Shapiro, Karl." You would know that the latter is the entry you are looking for. (The way the entry displays depends on how your indexes are configured.)

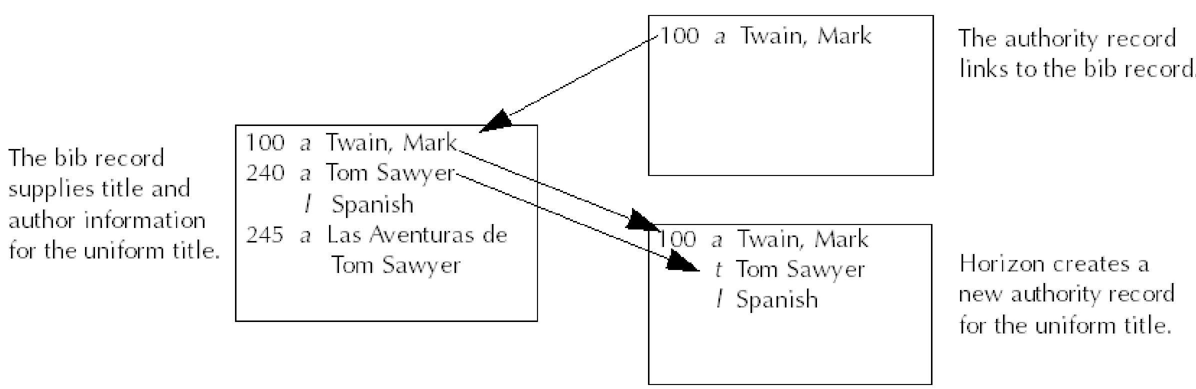
To allow searches in PAC and staff searching for uniform titles that you create, your system administrator needs to define search indexes to read the *a* and *t* subfields (and any others desired) of the 100 combined authority tag. (For instructions, see the “Searching Setup” chapter of the *System Administration Guide*.) Your system administrator also needs to set up uniform title parameters. (For instructions, see “Setting Up Uniform Titles” in the *Cataloging Setup Guide*.)

To make a uniform title, Horizon creates a new authority record. One authority record already exists for the author tag. Horizon creates a separate authority record that contains information from the bib record’s uniform title tag (MARC 21 tag 240 or 243) and the author tag (100, 110, or 111). This information is compounded into one new 100 tag on the new authority record. Horizon maps the two bib record tags (title tag and author tag) to the new authority record.

A combined authority tag is made up of subfields from these tags:

- **The co-tag**. The co-tag provides the author portion of the uniform title.
- **The uniform title tag**. The uniform title tag provides the title portion of the uniform title, as well as any other information that you want to include for the uniform title search. (For example, you could include the language of the item.) The uniform title tag is compounded with the co-tag to make the combined authority tag, and so is sometimes called a “compound tag.”

This illustration shows how two bib record tags make up one uniform title authority record. Note that the co-tag (the author portion) from the bib record is linked to two separate authority records:



This section explains these topics:

- **Creating a Combined Authority Record** on page 128
- **Editing a Combined Authority Record** on page 131

Creating a Combined Authority Record

A combined authority record is based on uniform title and authority information from a bib record. You create a combined authority record by adding a uniform title tag (for example, 240 or 243) to a bib record. The title and author information is compounded into a combined authority tag on the new authority record if these conditions exist:

- Both a compound tag and a co-tag (tag 100) must exist in the bib record.
- Subfields defined as mandatory in the compound tag and the co-tag must exist. These include the *a* subfield. (Horizon is normally set up to change a second *a* subfield to a *t* subfield. However, your system administrator may need to set up the mandatory tags and subfield change from *a* to *t*.)
- You cannot duplicate mandatory subfields on either the compound tag or the co-tag.

The combined authority tag displays as a uniform title displayed in a search results screen when you set up your search indexes to access it.

The author information is not displayed in the uniform title tag in the bib record, but it *is* displayed in the combined authority tag on the new authority record and as part of the uniform title displayed on a search results screen.

If all these conditions do not exist, Horizon does not create the new combined authority record with a link from the uniform title tag in the bib record. The information on the uniform title tag that you add is searchable with a uniform title index, but it is not linked with author information.

If either of the first two conditions do not exist, Horizon logs an error in the invalid audit log table when you try to compound uniform title tags and authority records. You can view the invalid audit log table and then resolve the problem in the MARC Editor. (For more information, see "Viewing the Invalid Audit Log" in the *Cataloging Setup Guide*.)

To allow searches for uniform titles that you create, your system administrator needs to define search indexes to read the *a* and *t* subfields (and any others desired) of the new combined authority tag. (For instructions, see the "Searching Setup" chapter of the *System Administration Guide*.) Your system administrator also needs to set up uniform title parameters. (For instructions, see "Setting Up Uniform Titles" in the *Cataloging Setup Guide*.)

To create a combined authority record

1. Open the bib record for which you want to create a uniform title.
2. Make sure that a co-tag (tag 100, 110, or 111) exists in the bib record.

   If a co-tag does not exist in the bib record, you cannot create a uniform title link unless you can create a co-tag. (For more information, see your system administrator.)

   Note: Your system administrator must set up Uniform Titles before Horizon recognizes the tag and co-tag associated with it.
3. Check to see if a uniform title tag (for example, 240 or 243) exists in the record, then do one of these options:

If the record has both the co-tag (100, 110, or 111) and a compound tag (240 or 243)	If the record does *not* have a uniform title tag
If these conditions exist, Horizon has already created a uniform title link for the record: • Horizon is set up for Uniform Titles • Linking is set to Always Link • Linking is set to Link On Match (and Horizon has made the link based on this setting) • The file has been saved Do one of these options: • Leave the uniform title link as it is. The task is finished. • Delete the existing uniform title tag and replace it with a new one, then continue with step 4. **Note:** Before you delete the existing uniform title tag, make sure that the information in it is not required to make a complete bib record. (For more information, see your system administrator.)	Add a uniform title tag (for instructions, see **Adding a Component to a MARC Record** on page 48), and continue with step 4.

4 Add information for the uniform title tag by doing one of these options:

Add information manually	Link an existing uniform title authority to a bib record	Use Browse Link
1. Enter the text that you want in the uniform title tag. 2. Leave the field. Horizon resolves the link based on the settings in the authority link type. (For more information on link types, see **Linking Authority-Controlled Records to Bib Records** on page 57.)	1. Open the uniform title authority record. 2. Choose **Marc, Link Record**, or click the **Link** icon ( ) in the toolbar. Horizon prompts you to specify the bib record tag number to which you want to attach the authority record. 3. Choose the uniform title tag that you added (USMARC 240 or 243).	1. In a subfield, enter the appropriate text of the uniform title to which you want to link. 2. Choose **Edit, Link Options, Browse Link**. **Note:** Before you can use Browse Link, your system administrator must set it up. (For instructions, see "Setting Up Browse Link" in the *Cataloging Setup Guide*.) Horizon displays the Title window. 3. Highlight the title that you want to link. 4. Click **Link**. Horizon resolves the link based on the settings in the authority link type. (For more information on link types, see **Linking Authority-Controlled Records to Bib Records** on page 57.)

5 Save your changes.

Editing a Combined Authority Record

When you edit the author of a combined authority record, you must edit two separate records: the combined record itself, and the authority record that links to the bib record. This is because the 1XX tag in the combined authority record pulls its information from the bib record, not from the actual author authority record. Horizon does not link the combined authority record to the author authority.

If you want to edit the title of a combined authority record, you need to edit only the combined record. Editing the combined authority record updates the bib record 24X tag.

If you edit either the 24X tag or the 1XX tag in the bib record, you break the original link and either create an entirely new authority-controlled record or link to a different existing authority-controlled record.

For instructions on editing tags, see **Editing Information in a MARC Record** on page 64.

SirsiDynix recommends that you use the global change feature in Horizon to edit both authority headings at the same time. (For more information, see **Globally Changing Authority Headings** on page 119.)

Deleting an Authority Record

You can delete an authority record only if no bib records are attached to it. If you want to delete an authority record that has bib records attached, you must first find all the bib records containing the authority tag that links to the authority record that you want to delete and delete the authority tag from each bib record. Once you have deleted all the authority tags, you can delete the authority record.

To delete an authority record

1 Open the authority record that you want to delete.

2 Choose **File, Delete Record**.

Horizon asks if you really want to delete the record.

3 Click **Yes**.

Horizon does one of these:

- If no bib records are attached, Horizon deletes the authority record. The task is finished.
- If bib records are attached, Horizon displays this message:

4 Click **OK**.

5 If you need to detach the attached bib records, do these steps:

a Start the **New Search** process.

The default location of this process is the **Searching** folder on the navigation bar.

b Search for the authority record that you want to delete. (For instructions, see **Using Staff Searching to Find an Authority Record** on page 118.)

c Highlight the authority when you find it.

d Click **Show Titles**.

Horizon displays a list of all bib records that are attached to the authority record that you want to delete.

e Highlight all the bib records in the list.

f Press **F10** or choose **Edit, Send To**.

g Highlight **MARC Editor**.

h Click **OK**.

Horizon sends the bib records to the MARC Editor.

i Find the tag that displays the authority record that you want to delete in one of the bib records that you have just sent to the MARC Editor.

j Put your insertion pointer anywhere in the tag.

k Choose **Edit, Delete Tag**.

Horizon deletes the tag.

l Save your changes.

m Repeat steps 5i through 5l in this table until all the bib records are closed.

n Make sure that the authority record that you want to delete is active.

o Choose **File, Delete Record**.

Horizon asks if you want to delete the record.

p Click **Yes**.

Horizon deletes the authority record.

Chapter 6: Item and Copy Records

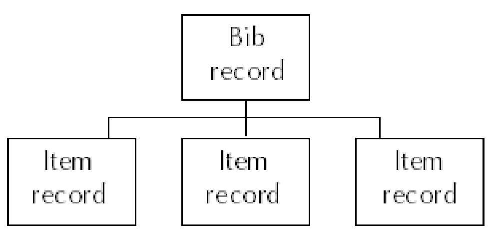
This chapter explains how to create and use item and copy records. Also, this chapter explains how to print spine labels and lists and how to work with Summary of Holdings.

This chapter contains these sections:

About Item and Copy Records

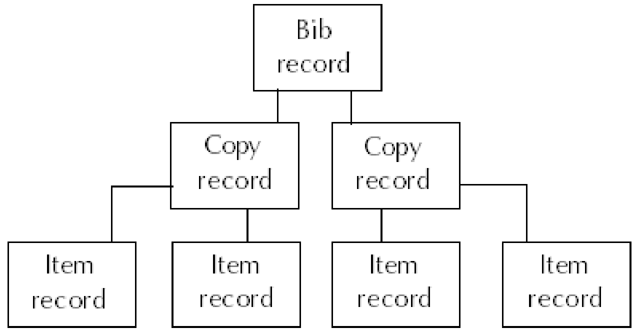
Each bibliographic (bib) record contains information describing a certain title, but you must also have an item record to identify each item that exists in your library. (For example, you could create a bib record for the book *A Stillness at Appomattox* by Bruce Catton, but until you create an item record for the copy you have on your shelves, the item does not exist in your database and cannot be accessed by your borrowers.) Your database can include bib records for which you have no item in your stacks, but you cannot have an item record without a bib record. Item records attach to bib records.

For example, if your library has three copies of *A Dangerous Fortune* by Ken Follett, three item records are attached to the bib record for that title, as illustrated here:

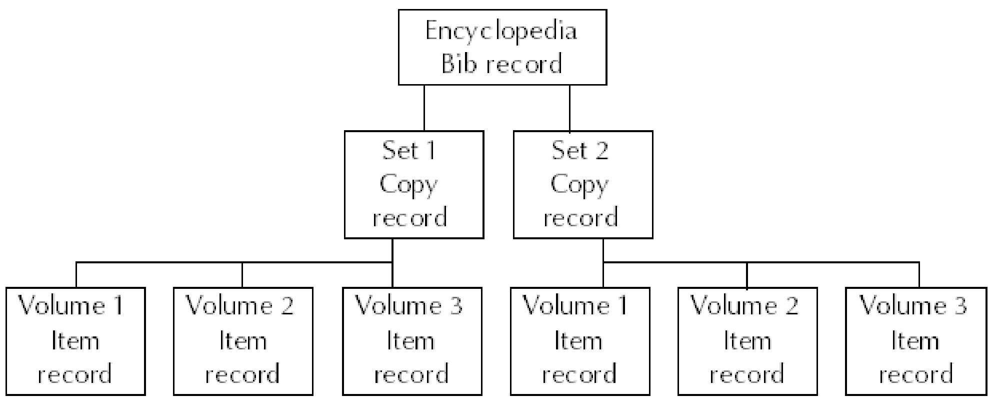


Copy records are records that let you group related item records together. They let you see how many sets of one title a library carries. They add another “layer” of cataloging records by representing multiple sets of a title.

A copy record is attached “between” a bib record and an item record to help keep a group of related item records together:



For example, if your library has four sets of the *World Book Encyclopedia*, and each set has 26 volumes, all 104 item records (volumes) are linked to one bib record. You group these item records by the set they come from when you create copy records, as illustrated here:



Both copy records and item records attach to bib records. When you attach a copy record to a bib record that already has items attached, Horizon inserts the copy record between the bib record and the item records. Horizon attaches the item records to the bib record *through* the copy record:

You attach an item record to a bib record either directly or through a copy record. You can “move” the item record to a different bib or copy record. (For instructions, see **Moving an Item Record** on page 186.)

You can create copy and item records manually. You can also create an item record manually, or you can have Horizon create item records automatically when you import bib records. You edit existing item and copy records to update holdings information.

Copy records are also created in Serials Control for periodicals. However, if you have multivolume titles that are not periodicals, you can create a copy record for them in Cataloging.

Working with Item Records

When you add items to your library, you add item records to your library database. You need to keep the item records accurate so your database correctly represents what items exist in your library.

This section explains these topics:

Opening a List of Items

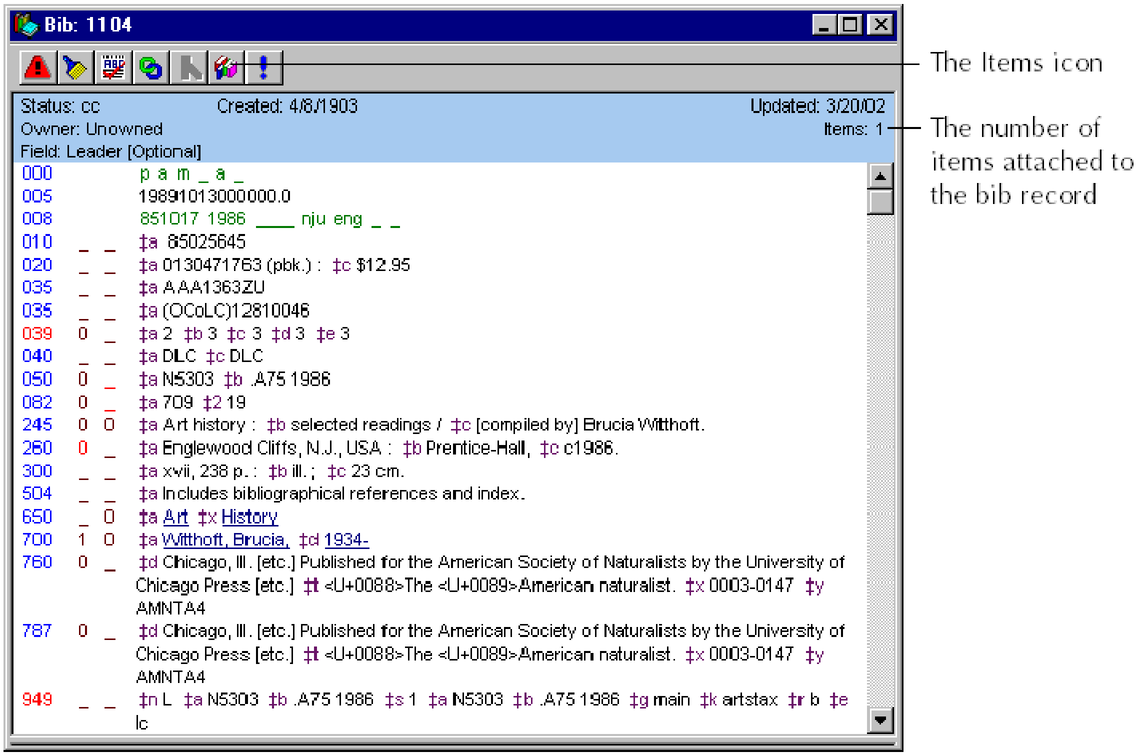
Several tasks require you to start from a list of items that is attached to a bib or copy record.

To open a list of items

1 Do one of these options:

- Create and save a new bib record. (For instructions, see **Creating a New Bib Record** on page 82.)
- Open an existing bib record that has the items that you want to view. (For instructions, see **Finding and Opening an Existing Bib Record** on page 83.)

If no copy records are attached to the bib record, the bib record displays the number of attached item records at the right side of the header and displays the Items icon () in the bib toolbar:



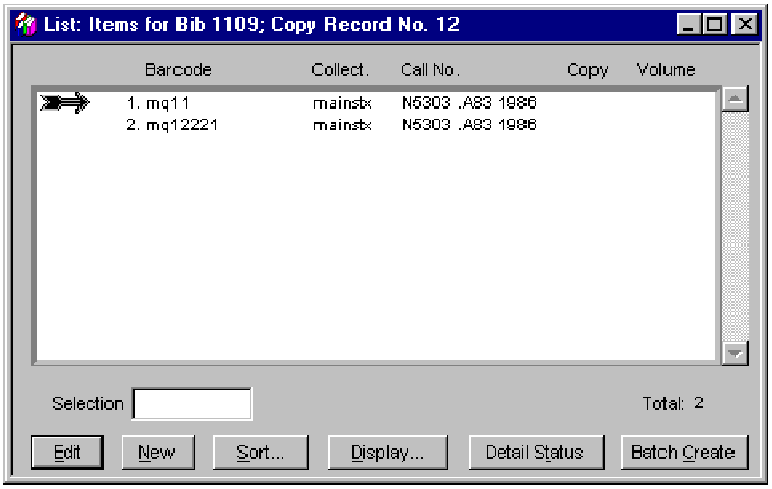
If copy records *are* attached to the bib record, the bib record shows the number of attached copies at the right side of the header and the Copies icon ( ) in the toolbar.

2 Do one of these options:

- If the bib record displays items, choose **Marc, Item Records**, or click the **Items** icon ( ).
- If the bib record displays copies, do these steps:
  - Choose **Marc, Copy Records**, or click the **Copies** icon ( ).

    Horizon displays a List Copy Records window.
  - Click the **Items** button.

Horizon displays a List Items window listing all items attached to the record:



Finding and Opening an Item Record

Horizon gives you several options for finding and opening an item record. This section explains these topics:

- **Opening an Item Record with Item Barcode Lookup** on page 138
- **Opening an Item Record Using Bib Quick Search** on page 139
- **Using Staff Searching to Open an Item Record** on page 140
- **Opening an Item Record through a Bib Record** on page 141

Opening an Item Record with Item Barcode Lookup

If you know the barcode of the item, the fastest way to open the item record is by using Item Barcode Lookup on the navigation bar.

To open an item record using Item Barcode Lookup

1 Start the **Item Barcode Lookup** process.

The default location of this process is the **Cataloging\Item Record** folder on the navigation bar.

Horizon opens this dialog box:

2 Enter the barcode number for the item that you want.

Horizon opens a List Items window containing the item barcode you entered.

3 Double-click the item that you want to edit.

Horizon opens the Edit Items window:

Opening an Item Record Using Bib Quick Search

If you know the barcode of the item, you can open the item record by using Bib Quick Search.

To open an item record using Bib Quick Search

1 Start the **Bib Quick Search** process.

The default location of this process is the **Cataloging\Bibliographic Record** folder on the navigation bar.

Horizon opens the Search Bib Quick Search window.

2 Highlight **Item Barcode**.

3 Enter the barcode number in the **Search for** field.

4 Click **OK**.

Horizon displays the bib record for the title in the MARC Editor.

5 Do one of these options:

- If the bib record displays items, choose **Marc, Item Records**, or click the **Items** icon ( ).

- If the bib record displays copies, do these steps:

  – Choose **Marc, Copy Records**, or click the **Copies** icon ( ).

  Horizon displays a List Copy Records window.

  – Click the **Items** button.

Horizon displays a List Items window listing all items attached to the record.

6 Double-click the item that you want.

Horizon opens the Edit Items window:

Using Staff Searching to Open an Item Record

You can use staff searching to search for an item and send the item record to the MARC Editor.

To use staff searching to open an item record

1 Start a **New Search.**

To do this, press **F2**, or find the process in the **Searching** folder on the navigation bar.

2 Conduct any kind of search and proceed through the search process until you open the Copies window that displays the item that you want to view.

Note: If the Show Copies button on the Bibliographic Detail window is grayed out, no item records exist.

3 Highlight the item that you want.

4 Choose **Edit, Send to**, or click the Send to icon ( )

5 Double-click **Copy/Item List.**

6 Double-click the item that you want.

Horizon opens the Edit Items window:

Opening an Item Record through a Bib Record

You can open an item record through a bib record. If a copy record is attached to the bib record, you must open the copy record first.

To open an item record through a bib record

1 Open the bib record to which the item is attached.

2 Do one of these options:

- If the bib record displays items, choose **Marc, Item Records**, or click the **Items** icon ( ).

- If the bib record displays copies, do these steps:

  – Choose **Marc, Copy Records**, or click the **Copies** icon ( ).

    Horizon displays a List Copy Records window.

  – Click the **Items** button.

  Horizon displays a List Items window listing all items attached to the record.

3 Double-click the item that you want.

  Horizon opens the Edit Items window:

Viewing Detailed Information about an Item

You can view detailed information about each item in your library. (For example, you can view cataloging information, such as the item's title and call number; circulation information, such as the item's status or borrower details; order information; or information about in-house use of the item.) You view the information from the Item Detail Status screen in Cataloging.

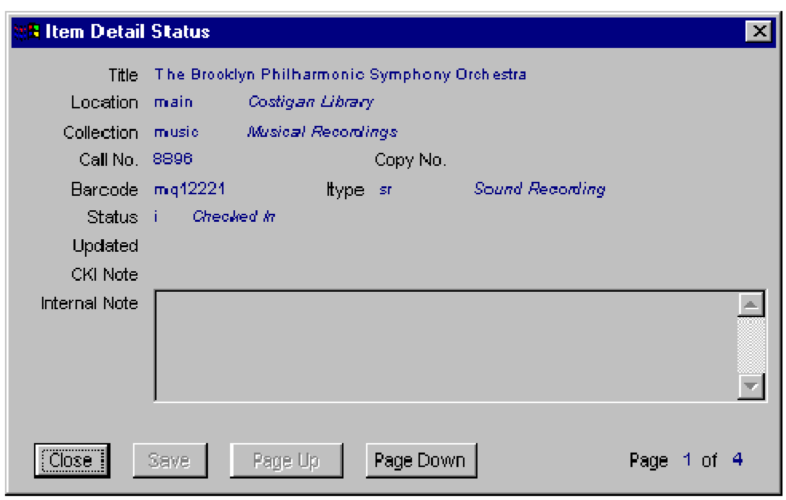
To view detailed information about an item

1 Open the List Items window for the item that you want to view. (For instructions, see **Finding and Opening an Item Record** on page 138.)

2 Highlight the item whose details you want to view.

3 Click **Detail Status**.

Horizon displays the Item Detail Status window:



Note: You cannot edit information in the Item Detail Status window. To edit information, you must go to the appropriate process (Cataloging, Circulation, or Acquisitions).

4 Click **Page Down** to find other information, including in-house use information.

Note: In-house use information displays only if your library tracks in-house use of items by checking in items that are used in your library without being checked out. (For more information on the in-house mode, see “Setting Up a Checkin Mode” in the “Checkout and Checkin” chapter of the *Circulation Guide*. For more information about item-specific in-house information, see “Using Other Horizon Circulation Reporting Options” in the “Reports” chapter of the *Circulation Guide*.)

Printing a List of Items

Horizon lets you print a list of items that shows information about each item such as the current borrower number, the item status, the last inventory date, or the number of checkouts. You can display and sort on any of the columns that are associated with the list before you print it. (For instructions, see “List Windows” in the “Horizon User Interface” chapter of the *Horizon Basics Guide* and “Printing a Bookmark List” in the “Searching” chapter of the *Horizon Basics Guide*.)

Creating Item Records

You can create item records manually. Your system administrator can set up Horizon so that it automatically fills the call number field. If you need to create several item records for a single title, you can create them as a group.

You can also set up Horizon to automatically create item records for bib records being imported. (For instructions, see **About Importing and Exporting Records** on page 235.)

When you create item records to attach to a bib record that has copy records attached, the items attach to a copy record. The Count column in the List Copy Records window specifies how many items are attached to each copy record. After you create an item record, you need to save and close it along with the List Items window to get an accurate count of items attached to the copy record. (For more information, see **About Item and Copy Records** on page 134.)

This section explains these topics:

Creating a Single Item Record

You create a single item record for each item that you add to your library collection. You can create a single item record from scratch or by copying and editing an existing item record.

This section explains these topics:

- **Creating a Single Item Record from Scratch** on page 144
- **Creating an Item Record by Copying an Existing One** on page 148

Creating a Single Item Record from Scratch

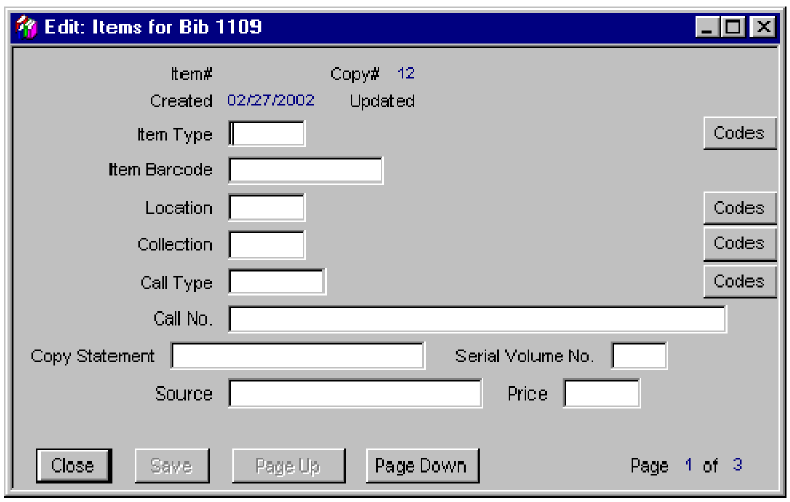
You can create a single item record by completing all the fields in an item record.

To create a single item record

1 Open the List Items window for the bib record to which you want to add an item record. (For instructions, see **Opening a List of Items** on page 136.)

2 Click **New**.

Horizon displays the Edit Items window:



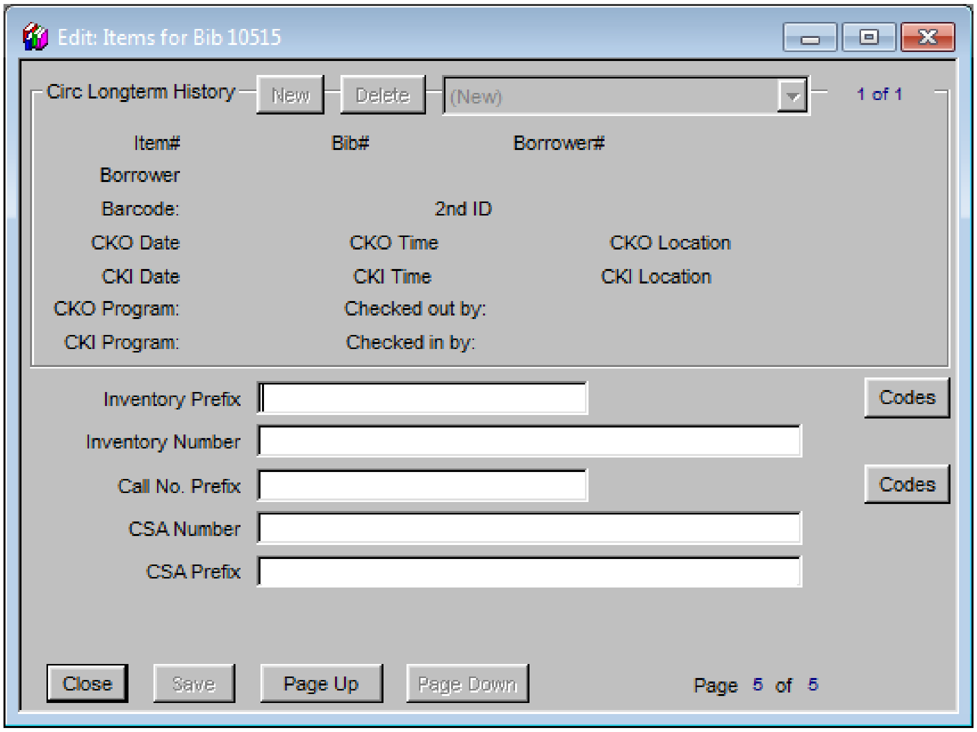
3 Use this table to complete the fields on the window as needed (if you do not complete a required field, Horizon displays a reminder when you try to save the item record):

Field	Action
Item Type	Enter the ITYPE (Item Type). This is a required field. The ITYPE determines the general circulation rules that apply to the item. Circulation rules or privileges include loan period, fine rate, grace period, renewal period, and so forth. (ITYPE is not the same as Collection.) Click **Codes** for a list of valid ITYPEs. Your system administrator sets up the ITYPEs for your system. (For more information, see “Defining an Item Circulation Type [ITYPE]” in the “Preparing Horizon to Work with Item Records” section of the *Circulation Setup Guide*.)

Field	Action
Item Barcode	Enter the item barcode. This is a required field. You can enter or scan the barcode into this field. When items are batch created, Horizon inserts temporary barcodes in this field for each record, which you must then edit individually. **Note:** This field is not only required but must contain a unique number. If your library is not barcoding items, you must still enter something in the Barcode field. One suggestion is to enter the bib record number, followed by a space, followed by 1, 2, 3, and so forth, for each item.
Location	Enter the location where the item is housed. This is a required field. Location carries such information as whether fines accrue when the library is closed and what days the library is open and closed, or click **Codes** for a list of valid locations. Your system administrator sets up the locations for your system. (For more information, see “Library Locations” in the “General Setup” chapter of the *System Administration Guide*.)
Collection	Enter the collection to which the item belongs. This is a required field. Collection reflects the form or content of the item, such as reference or music, or click **Codes** for a list of valid collections. Your system administrator sets up collections for your system. (For more information, see “Collections” in the “General Setup” chapter of the *System Administration Guide*.)
Call Type	Enter the call number type. Click **Codes** for a list of valid call types. **Note:** Information that you enter in this field overrides the default call type for the collection that you entered in the Collection field.
Call No.	Enter the call number of the title. You can copy the call number from the bib record into this field. If you copy a call number tag into the item record, you need to delete extraneous characters, such as subfield delimiters and indicators.
Copy Statement	Enter a copy statement to specify which copy of the title the item record represents. This is not the same as the Copy record that Horizon uses. The copy statement on the item record indicates which of several identical items you are currently describing.

Field	Action
Serial Volume No.	Enter the serial volume to specify which volume in a series the item record represents. You must enter a numerical value.
Source	Enter the source from which you obtained the item. (For example, if you bought the item from a local bookstore, enter the name of the store.)
Price	Enter the price of the item.
Staff-Only	If you mark this box, only staff can view the item on a search results screen. If you leave this box unmarked, the public can view the item on a search results screen. **Note:** The Staff-Only feature works only if your library has set up Public-Only indexes. (For help in setting up public-only indexes, contact your system administrator. There may be an additional charge for this service.)
Item Note	Enter any notes about the item. The public can view these notes on a search results screen.
Item Status	Enter the item status. This is a required field. Item statuses are generally system-assigned. (For example, if an item is currently being created or is new to the catalog, the system can assign it a status of “In Cataloging.” If the item is checked out, the status is “Checked Out,” and so forth.) If you get an error message while entering a status, you must change the item status from Circulation. (For more information, see “Working with Item Statuses” in the “Preparing Horizon to Work with Item Records” section of the *Circulation Setup Guide*.)
Fast-Add	Horizon automatically marks this box if the item was fast-added in another part of Horizon. (For more information, see “Fast-Adding Item and Bib Records” in the “Borrower and Item Records” chapter of the *Circulation Guide*.)
Internal Note	Enter any additional notes about the item. Only staff can view these notes when they view an item record. Press **CTRL+ENTER** to move to the next line in this field.

4 If your library is using the Inventory Number, the Call Number Prefixes, or the Closed Stack Access Call Number Prefixes feature, complete the following fields as appropriate:



Field	Action
Inventory Prefix	Enter the prefix that Horizon should add to the beginning of this item's Inventory Number. Click **Codes** to select a prefix from a list of possible values.
Inventory Number	Leave blank if you want Horizon to fill in this field automatically based on the value of the Inventory Prefix field. If you manually enter a value in this field, Horizon saves the Inventory Number as-is without using the value in the Inventory Prefix field, if there is one.
Call No. Prefix	Enter the prefix that Horizon should add to the beginning of this item's Call Number. Click **Codes** to select a prefix from a list of possible values.
CSA Number	Leave blank if you want Horizon to fill in this field automatically based on the value of the CSA Prefix field. If you manually enter a value in this field, Horizon saves the CSA Number as-is without using the value in the CSA Prefix field, if there is one. **Note:** This field does not display by default; it must be added manually to the item Mq View to display in the item record. For information on how to add this field to the item record, see the "Setting Up Call Number Prefixes for Closed Stack Access" topic of the Cataloging Setup Guide.

Field	Action
CSA Prefix	Enter the prefix that Horizon should add to the beginning of this item's CSA Call Number. Click **Codes** to select a prefix from a list of possible values. **Note:** This field does not display by default; it must be added manually to the item Mq View to display in the item record. For information on how to add this field to the item record, see the "Setting Up Call Number Prefixes for Closed Stack Access" topic of the Cataloging Setup Guide.

Note: Inventory number functionality is feature-activated; if you want to use the Inventory Number feature on your library system, contact SirsiDynix Customer Support.

Note: Call number prefix functionality is feature-activated; if you want to use the Call Number Prefix feature on your library system, contact SirsiDynix Customer Support.

Note: CSA call number prefix functionality is feature-activated; if you want to use the CSA Call Number Prefix feature on your library system, contact SirsiDynix Customer Support.

5 Save your changes.

Creating an Item Record by Copying an Existing One

You can copy a single item record in order to create another single item record.

To create an item record by copying an existing one

1 Open the List Items window that contains the item record that you want to copy. (For instructions, see **Opening a List of Items** on page 136.)

2 Highlight the item that you want to copy.

3 Choose **File, Copy Record**.

Horizon opens a copy of the item record you chose with certain fields blank.

4 Edit item information in the new record so that it corresponds with the physical copy for which you are creating the record. (For a description of each field, see **Creating a Single Item Record** on page 143.)

5 Save your changes.

Automatically Filling the Call Number Field in a New Item Record

Horizon can automatically fill the call number field when you create a single new item record in Cataloging. This can cut down on the number of keystrokes needed to create a new record. Your system administrator must set this up. (For instructions, see “Automatically Filling the Call Number Field in a New Item or Copy Record” in the “Setting Up Call Numbers” section of the *Cataloging Setup Guide*.)

This feature affects only newly created bib records, not imported records. You can use the 949 tag to import call numbers. (For more information, see “Setting Up Item Creation Parameters” in the “Setting Up Import Source Parameters” section of the *Cataloging Setup Guide*.)

Horizon uses the call number information from the bib record to automatically fill a new item record call number field unless a copy record exists. If a copy record exists, Horizon uses the call number information from the copy record to which the item record is attached. If you change the copy record call number before you create a new item record, the item record uses the changed copy record’s call number, not the bib record call number.

Your system administrator can also set up a default call number that automatically displays in every item record that you create. This can help if you want to create a large number of records that use the same call number. This default call number overrides any automatic fill settings. (For more information, see “Defining a Default Value for a Call Number” in the “Setting Up Call Numbers” section of the *Cataloging Setup Guide.*)

When you create new item records by copying an existing item record, Horizon copies *all* the information from the item record that you copy, including the call number. (For more information, see **Creating Multiple Item Records** on page 149.)

Creating Multiple Item Records

You may need to create multiple item records for the same bib record. If you need to create only a few item records, you can create the first record manually, then copy and edit it to create additional records. (For instructions, see **Creating a Single Item Record** on page 143.)

If you need to create many item records, you can create the first record manually and batch create as many item records as you need. Then you can edit each batch-created record as necessary.

When you batch create items, you specify a range of copy numbers, volume numbers, or barcodes. You can specify one, two, or all three. You do this by entering the first copy, volume, or barcode number, and then the last. These numbers must be sequential. Horizon assigns the range of copy, volume, and barcode numbers to the items.

Horizon assigns the default status from the item_status view to the records you create if the default status is valid for the batch created item records. If it is not valid, Horizon assigns the item record status “In Cataloging.”

When you specify a range of copy numbers, you do not create Horizon copy records. You create item records that display a copy number in the Copy Statement area of the item record. If you want to use a Horizon copy record with items attached to the copy record, you must create the copy record. (For instructions, see **Creating a Copy Record** on page 179.)

To batch create item records

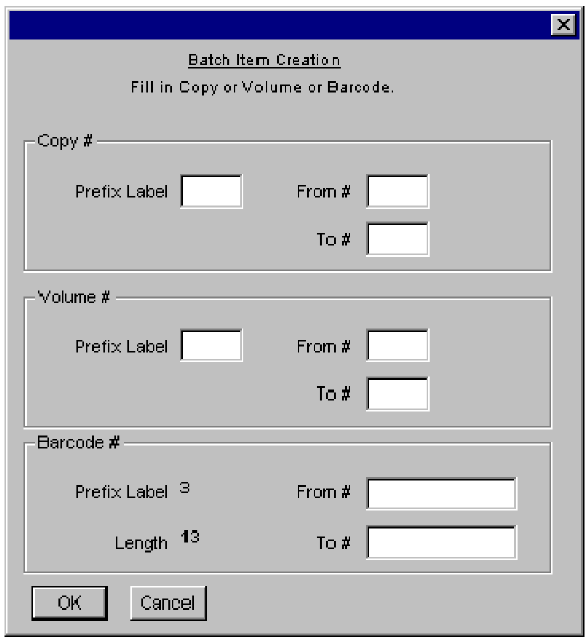
1 Open a List Items window for the bib record to which you want to add items. (For instructions, see **Opening a List of Items** on page 136.)

2 If no item record exists for the bib record, create one. (For instructions, see **Creating a Single Item Record** on page 143.)

3 Highlight an item in the list.

4 Click **Batch Create.**

Horizon displays the Batch Item Creation window:



You can batch create items that include information from any one, two, or all three groups.

Note: If you see Copy No. and Volume # group at the top of the window instead of the Copy # group, a copy record already exists. Item records that you create attach to it.

5 If you choose to create items by copy number, complete these fields in the **Copy #** group:

Field	Action
Prefix Label	Enter information that should display before the copy number. For example, enter "C." or "Copy".
From #	Enter the starting number of the range of items. For example, enter "1".

Field	Action
To #	Enter the ending number of the range of items. For example, if you have five copies, enter “5”.

6 If you choose to create items by volume number, complete these fields in the **Volume #** group:

Field	Action
Prefix Label	Enter information that should display before the volume number. For example, enter “V.” or “Vol”.
From #	Enter the starting number of the range of items. For example, enter “1” or “A”.
To #	Enter the ending number of the range of items. For example, if you have 26 copies, enter “26” or “Z”.

7 If you choose to create items by barcode number, complete these fields in the **Barcode #** group:

Field	Action
Prefix Label	Enter information that should display before the volume number. (For example, enter “V.” or “Vol”.)
From #	Enter the starting number of the range of items. (For example, enter “1” or “A”.)

8 Click **OK**.

Horizon creates the specified number of copies, volumes, and barcodes.

During the batch create process, Horizon displays a message box reporting its progress. When the batch create process finishes, Horizon displays the List Items window containing all the items associated with the bib or copy record. You can edit the new item records one at a time, as necessary, or batch edit groups of items. (For instructions, see **Editing Item Records** on page 152.)

If the batch create process tries to insert duplicate data, Horizon displays these error messages:

If this error displays	Do this
Attempted to insert a duplicate row. Attempt to insert duplicate key row in object 'item' with unique index 'item_ibarcode_index'. Command has been aborted. General SQL Server error: Check messages from the SQL Server.	1. Press **ENTER**. 2. Check the list of items to see which items were created. 3. Run the process again, but change the range of barcodes to make sure that the remaining new items have unique barcodes.
A barcode in the range you specified has already been created and assigned to another item.	Check the list of items to see which barcodes were assigned. For example, if you wanted to create items with barcodes ending 1 through 10 and the list shows that only barcodes 1 through 7 were assigned, you can assume that number 8 was the duplicate. Start the process again specifying numbers 9 through 11 to finish the batch.

Editing Item Records

You can open an item record and edit information about that item. For those titles that have several items, you can simultaneously edit shared information such as location, item type, and collection. (For information about the fields in item records that you can batch edit, see your system administrator.)

Your library may occasionally use short non-standard item barcodes (those that are shorter than your system administrator has defined in the location view). If you modify and save any item barcodes on in-transit items, Horizon automatically pads or adds digits to equal the defined barcode length. When the items get to the new location, users or staff cannot search for them because the barcodes are invalid.

If you do *not* modify and save a barcode as you work with in-transit items, Horizon leaves short, non-standard barcodes as they are.

This section explains these topics:

- **Editing a Single Item Record** on page 152
- **Batch Editing Item Records** on page 153

Editing a Single Item Record

You may need to edit a single item record if its barcode is damaged or missing, if the cataloging information you purchased for it is incomplete, or if your circulation staff fast-added it during checkout.

To edit a single item record

1 Open the List Items window containing the item record that you want to edit. (For instructions, see **Opening a List of Items** on page 136.)

2 Highlight an item that you want to edit.

3 Click **Edit**.

Horizon displays the Edit Items window.

4 Make any necessary changes to the data for that item's record.

If a field requires a predefined value, click **Codes** to the right of that field to view a list of possible values.

(For a description of each field, see **Creating a Single Item Record** on page 143.)

5 Save your changes.

Batch Editing Item Records

You can make the same change to a group of item records with the same title.

For example, suppose you have 20 identical items and 10 of those items should be housed at location A and the rest at location B. After you create all 20 items, you can batch edit 10 of the items to show that they are housed at location B.

You cannot batch change item status to "i" (Checked In).

To batch edit item records

1 Open the List Items window that has the items that you want to batch edit. (For instructions, see **Opening a List of Items** on page 136.)

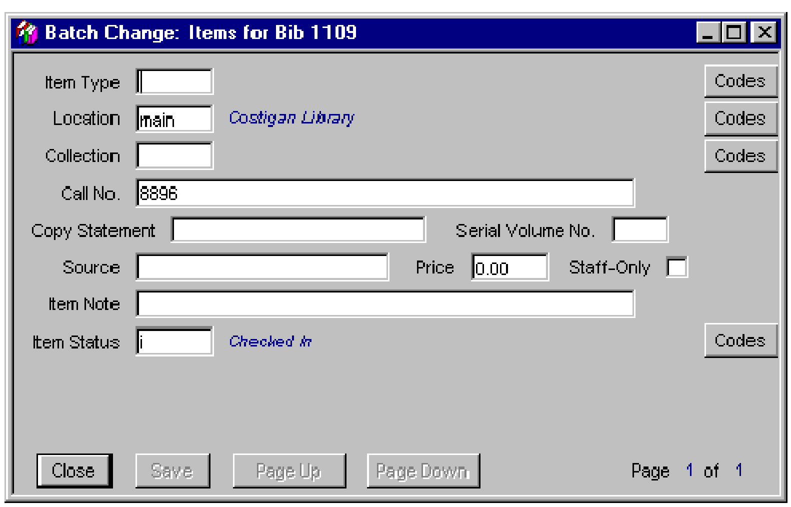
2 Highlight all the items that you want to batch edit.

3 Click **Edit**.

Horizon displays a message prompting you to verify that you want to edit the highlighted items as a batch.

4 Click **OK**.

Horizon displays the Batch Change window:



5 Enter the information that you want to apply to all the highlighted items in the appropriate fields. (For example, you might enter a location code that represents where all the items are housed.)

(For information about the fields in item records that you can batch edit, see your system administrator.)

6 Save your changes.

Printing or Exporting Labels

Your system administrator chooses whether you print or export to a file all of your cataloging labels (such as spine or card labels). You might choose to export individual labels or a batch of labels to a file so that you can later print those labels on a laser printer. This may be helpful if you do not have a spine label printer.

When you start the label printing process, Horizon lets you choose to print the label or export the label to a file. If you choose to export the label to a file, Horizon exports the contents of the label to an HTML label template file that your system administrator sets up on a local workstation. You can choose to export an individual label to template file and print it, or you can export multiple labels to one file so that you can then print on your label sticker page. You can also print or export cataloging labels for items if you know the items' barcode numbers.

If you edit spine labels before you print them, the editing changes take effect only if you are printing individual labels.

Before You Begin

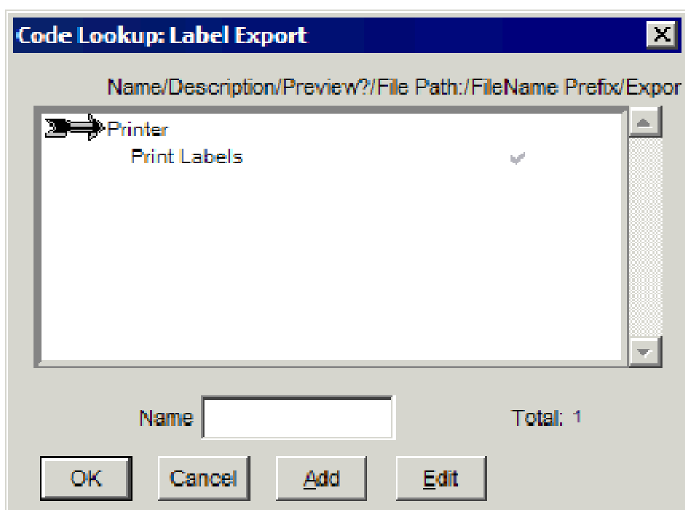
- Make sure that your system administrator has set up a usable label set. (For instructions, see "Labels" in the "General Setup" chapter of the *System Administration Guide*.)
- Make sure that the collection of items for which you want to print or export labels has a label set code assigned to it. (For instructions, see "Collections" in the "General Setup" chapter of the *System Administration Guide*.)
- If you are exporting labels, make sure that your system administrator has set up spine label exporting parameters. (For instructions, see the "Setting Up Spine Label Exporting" section of the "General Setup" chapter of the *System Administration Guide*.)

To print or export labels

1 Do one of these options:

If you want to print or export labels from a List Items window	If you want to choose labels to print or export using barcodes
1. Open the List Items window that contains the items for which you want to print or export labels. (For instructions, see **Opening a List of Items** on page 136.) 2. Highlight the items for which you want to print or export labels. 3. Choose **Items, Print Spine Labels**.	1. Gather the barcode numbers of the items for which you want to print or export labels. 2. Start the **Batch Print Spine Label** process. The default location of this process is the **Cataloging\Item Record** folder on the navigation bar. Horizon opens the barcode print dialog box:  3. Enter the barcode for the label that you want to print or export. 4. Click **OK**.

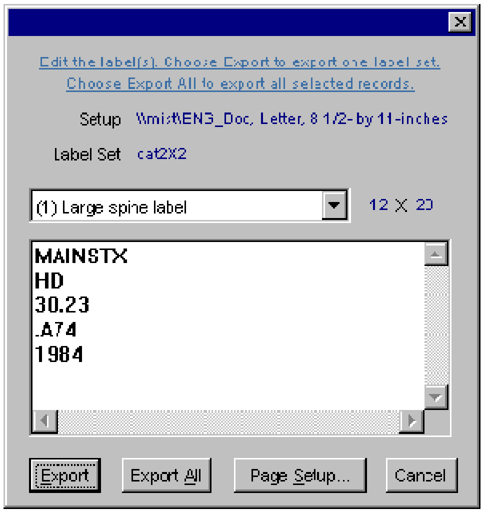
Horizon opens the Code Lookup Label Export window:



2 Do one of these options:

- If you want to print the labels, choose the printer where you want to print the labels.
- If you want to export the labels to a file, choose the file information that you want to use.

Horizon opens a label exporting window:



3 If you want to confirm or alter the printing information, do these steps:

a Click **Page Setup**.

b Make any necessary changes.

c Click **OK**.

4 Choose the set of labels that you want to print or export from the drop-down menu.

5 If you want to edit the label, click on the label display and edit it as you would if you were using a word processor.

Important: If you edit spine labels before you print them, the editing changes take effect only if you are printing individual labels. To print multiple copies of an edited spine label, click the **Page Setup** button on the label printing window and change the number of copies that you want to print.

6 Do one of these options:

- If you are printing labels for only one item, click **Print**.
- If you are printing labels for multiple items, click **Print All**.
- If you are exporting labels for only one item, click **Export**.
- If you are exporting labels for multiple items, click **Export All**.

Horizon prints or exports the labels.

If you are working from the List Items window, the task is finished.

If you are using the Batch Print Spine Label process, Horizon displays the empty barcode window.

7 Enter the barcode of the next item for which you want to print or export labels.

8 Click **OK**.

Horizon opens the label exporting window for the next label.

9 Repeat steps 3 through 6 until you have printed or exported all the labels that you want.

10 When you finish, click **Cancel** on the label exporting window.

Horizon returns you to the barcode window.

11 Click **Cancel**.

Horizon returns you to the MARC Editor.

Deleting a Single Item Record

Deleting an item record removes the holdings information from the database. You can delete either one item record at a time or a group of item records for a single title.

If an item record has an unresolved status, Horizon warns you that you must resolve the problem before Horizon can delete the item.

Your system administrator can set these defaults that define how Horizon processes information when you delete an item record:

- Whether to save information about the item records that you delete.
- If you save information, what MARC tag is used to store your library's control number (usually either the 001 or 035 tag).
- If you save information, what bibliographic data Horizon should save along with the discarded item data.

For more information, see "Setting Up Item Delete Options" in the "Setting Up Batch Item Delete" section of the *Cataloging Setup Guide*.

These defaults apply to item records deleted in Cataloging. They do not apply to the deletion of a fast-added item at Circulation checkin or to the deletion of an item when it is withdrawn from Reserve Book Room.

To delete a single item record

1 Open the List Items window that contains the item records that you want to delete. (For instructions, see **Opening a List of Items** on page 136.)

2 Highlight the item records that you want to delete.

3 Choose **File, Delete Record**.

4 Horizon asks if you want to delete the record and then displays one of these additional messages:

If the item has this status	Horizon displays this message	Do this
Being held	This item is marked as being on the hold shelf. OK to delete anyway?	Do one of these options: • If you want to resolve the hold before you delete the record, click **Cancel**. • If you want to delete the record without resolving the hold, click **OK**.
Checked in	OK to delete selected record(s)?	Click **OK**.
Checked out	Cannot delete an item that is checked out	1. Use Circulation to check the item in. (For instructions, see “Checking In an Item” in the “Checkout and Checkin” chapter of the *Circulation Guide*.) 2. Return to Cataloging. 3. Repeat this task.
Claimed returned	This item is marked as CLAIMED RETURNED. Do you want to charge the borrower for losing it?	If you want to charge the borrower, click **Yes**; otherwise, click **No**. In either case, Horizon deletes the item.
Lost	This item is marked as LOST. Has the item been found, in which case the borrower will be credited?	If you want to credit the borrower the cost of the item, click **Yes**; otherwise, click **No**. In either case, Horizon deletes the item.
Missing	This item is marked as MISSING. Has the item been found, in which case the borrower will be credited?	If you want to credit the borrower the cost of the item, click **Yes**; otherwise, click **No**.
On order	This item is marked as being on order in Acquisitions. OK to delete anyway?	If you want to delete the item, click **OK**; otherwise, click **Cancel**.
Recall	Can not delete an item that is being recalled.	You cannot delete this item until the status changes.

Deleting Multiple Item Records

Horizon lets you remove groups of item records from your library’s database if you no longer want them. You do this with the Batch Item Delete process. Your system administrator must set up this process and give you the rights to use it.

Batch Item Delete can help you do these tasks:

- Create a list of items that your library is discarding.

- Delete the entire list of item records from the database, or delete only selected item records from the list. Horizon removes these records from the database during Day End.
- Choose to save deleted record information on the Horizon database.
- Review any records that Batch Item Delete cannot remove during a session.
- Create an output file that you can send to interested parties (for example, if you use a union catalog, you can send the file to the department that updates the union catalog).
- Generate reports about discarded items.
- Permanently remove saved information about deleted items from the database.

During the deletion process, you may be able to specify these options:

- Whether to create an output file containing information about the records.
- The library code that should identify the output file as coming from your library.
- Whether to save information about the deleted records.
- How Horizon should handle bib records, if the item record you are deleting is the last item record attached to that bib record.

  If you choose to delete the bib records, the delete process deletes and de-indexes any appropriate bib records. Horizon also removes these bibs from the database during Day End.

  If you choose to flag the bibs as staff only, Horizon marks the bibs as staff only and re-indexes them.

Any bib record for which the item record you delete is the last copy must be eligible for deletion (for example, the bib cannot be on reserve). If Horizon cannot delete a bib record, Horizon deletes the item record, records the problem with the bib record in the mistrake table, and displays a message at the end of the deletion process.

Your system administrator must give you the rights to make these choices. (For more information on administrator-assigned rights, see “Securing Horizon” in the “Security and Preferences” chapter of the *System Administration Guide*.)

When Batch Item Delete deletes an item record and you have chosen to save deleted record information, Horizon preserves the record’s last known item status, such as “lost” or “missing.” This means that you do not need to change the item status to “weed” before you can delete the item record.

The Batch Item Delete process lets you delete most items that are linked to copy records. However, Horizon does not delete the related bib record if a copy record is still linked to the bib.

When you delete serial items, Horizon does not automatically update the Summary of Holdings.

This section explains these topics:

- **Creating a List of Item Records to Delete** on page 160

- **Deleting a Batch of Items** on page 164

Creating a List of Item Records to Delete

Before you can delete a group of item records from your database, you need to create a list of the records that you want to delete. When you open Batch Item Delete, Horizon displays a compound search as its initial search screen. However, you can create a deletion list by choosing item records using any of these methods:

- Performing a Compound Search.
- Performing a Where clause search.
- Scanning individual item barcodes.
- Working with an existing group.
- Searching the library catalog for item records and sending them to Batch Item Delete.

You can work with the list as soon as you create it. You can also create a group to save and work with the list later. You can also access any group that may have been created using the Item Group Editor or the item_report table in the Table Editor.

This section includes these topics:

- **Creating a List Using a Batch Item Delete Search Window** on page 160
- **Creating a Group of Item Records** on page 163
- **Using an Existing Item Group** on page 163
- **Sending an Item Record to Bach Item Delete from Cataloging** on page 164

Creating a List Using a Batch Item Delete Search Window

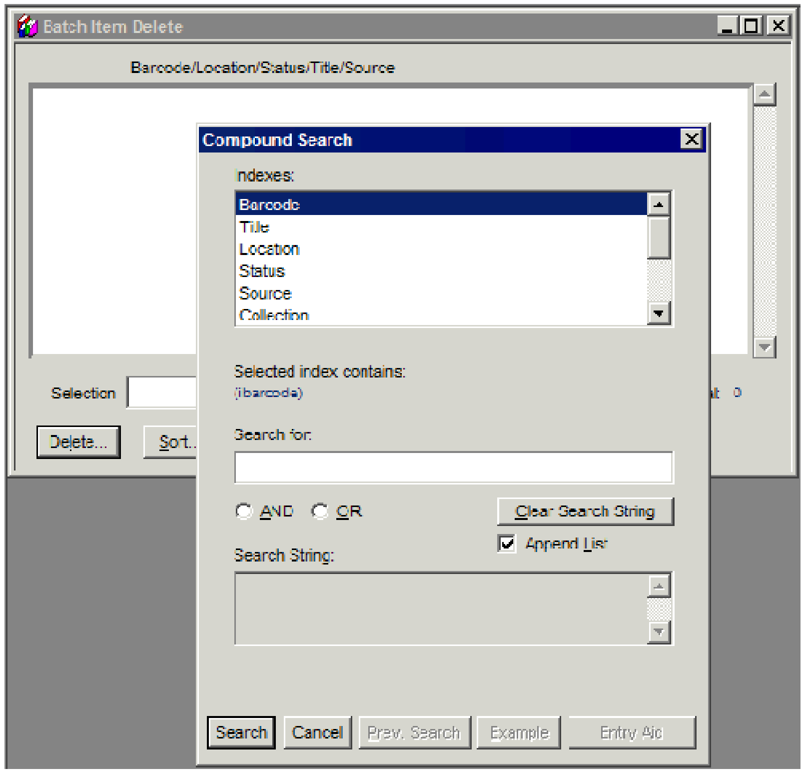
When you open the Batch Item Delete window, you can use several Horizon search tools to create a list of item records that you want to delete. You can also scan barcodes to create a list.

To create a list using a Batch Item Delete search window

1 Start the **Batch Item Delete** process.

The default location of this process is the **Cataloging\Item Record** folder on the navigation bar.

Horizon opens the Batch Item Delete window and a Compound Search window:



Note: If you already have Batch Item Delete open, you can choose a search option from the File menu. However, if the Batch Item Delete window already contains data, Horizon replaces the data when you do a new search unless you add criteria to a previous search by marking the Append List box.

2 Do one of these options:

- If you want to enter individual item barcodes, do these steps:
  - Highlight the **Barcode** search index.
  - Scan the first barcode into the **Search for** field.

    Horizon finds the item record containing that barcode and adds the record to the Batch Item Delete window.
  - Make sure that the **Append List** box is marked.
  - Continue scanning barcodes until your list is complete.

    The task is done.
- Highlight the search index in which you want to search (you can use wild cards to search for a range of items in most of these indexes):

Barcode	Title
Location	Status

Source	Collection
Call No	Copy
Volume	Notes
Item#	Bib#

3 In the **Search for** field, enter the term or code for which you want to search.

4 If you want to add another search parameter, do one of these options:

- Mark the **AND** button (to limit your search).
- Mark the **OR** button (to expand your search).

5 Continue adding search parameters until you enter all the search parameters that you want.

6 Click **Search.**

Horizon displays the Batch Item Delete window containing the items in your collection that match your search criteria.

Note: If Horizon does not find items in your collection matching your search criteria, a message displays to tell you that nothing was found. Click **OK** to return to the Compound Search screen and enter new search criteria.

7 If you want to refine your search or start a new search, do one of these options:

To use an SQL statement search	
1. Choose **File, Where clause**. If you choose the Where clause option when Horizon is displaying the results of your current search, the parameters for the first search display in the Where clause field. 2. If you want to, do one of these options: • To refine the search results, add to the parameters and click **Search**. • To use different parameters, delete the displayed parameters and start a new search. (For instructions, see “Using a Where Clause to Search for Rows” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide.*)	1. Choose **File, Compound Search**. This lets you perform Boolean searches using the AND and OR operators. If you choose the Compound Search option when Horizon is displaying the results of your current search, you can click **Prev. Search** to redo or add to a search that you made previously. 2. If you want to, do one of these options: • To add to the previous search parameters, mark the **Append List** box. Then add to the parameters and click **Search**. • To use different parameters, click **Clear Search String** and start a new search. (For more information, see “Doing a Compound Search” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide.*)

Note: When Batch Item Delete is open, you can choose File and one of the search options at any time to perform new searches or to add to current searches.

Creating a Group of Item Records

You can begin compiling a list of titles that you want to delete and save them as a group. This lets you compile your list over a period of time. It also lets you compile and delete item records in separate sessions.

You cannot retrieve groups in the Report and Purge Discarded Items process.

To create a group of item records

1. Create, or begin creating, a list of record items to delete. (For instructions, see **Creating a List Using a Batch Item Delete Search Window** on page 160.)

2. When you are ready to create your group, highlight the items in the Batch Item Delete window that you want to include in your new group.

   To highlight the entire list, choose **Edit, Select All**.

3. Choose **Group, Create Group**.

   Horizon opens the Create Group dialog box.

   If you have previously retrieved or created a group during this session, Horizon displays the name of that group in the Group Name field.

4. Enter a new name for the group in the **Group Name** field.

   You can add a date as part of the name to help you keep your groups organized.

5. Click **OK**.

   Horizon returns to the Batch Item Delete window.

Using an Existing Item Group

You can begin compiling a list of titles that you want to delete and save them as a group. This lets you compile your list over a period of time. It also lets you compile and delete item records in separate sessions.

You cannot retrieve groups in the Report and Purge Discarded Items process.

To create a group of item records

1. Create, or begin creating, a list of record items to delete. (For instructions, see **Creating a List Using a Batch Item Delete Search Window** on page 160.)

2. When you are ready to create your group, highlight the items in the Batch Item Delete window that you want to include in your new group.

   To highlight the entire list, choose **Edit, Select All**.

3. Choose **Group, Create Group**.

Horizon opens the Create Group dialog box.

If you have previously retrieved or created a group during this session, Horizon displays the name of that group in the Group Name field.

4 Enter a new name for the group in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.

5 Click **OK**.

Horizon returns to the Batch Item Delete window.

Sending an Item Record to Bach Item Delete from Cataloging

You can send individual item records to Batch Item Delete from Cataloging. This lets you create a list of titles and then delete them all at once.

To send an item record to Batch Item Delete from Cataloging

1 Start the **Batch Item Delete** process.

The default location of this process is the **Cataloging\Item Record** folder on the navigation bar.

2 Open the item record that you want to delete. (For instructions, see “Finding and Opening an Item Record” in the “Item and Copy Records” chapter of the *Cataloging Guide*.)

3 Press **F10** or choose **Edit, Send to**.

Horizon opens the Send To dialog box.

4 Choose **Batch Item Delete**.

Horizon sends the item record to the list displayed in the Batch Item Delete window.

Note: The Batch Item Delete process displays in the Send To list only if the Batch Item Delete window is open or minimized on your workstation.

5 If you want to add other item records to the list from Cataloging, repeat steps 2 through 4 for each record.

Deleting a Batch of Items

After you create a list or group of items, you can delete the entire list. You can also select items on the list to delete. You may be able to choose from these options:

- What should happen to the bib record if the item record you delete is the last item record attached to the bib record.
- Whether to create an output file. Here is the data format of the output file:

Section of File	Position	Description
Header (22 characters)	1 through 4	Library Identification Code, left justified, blank filled
	5 through 22	Number of records contained in the file, right justified, zero filled
Record (22 characters) This section repeats for each item record deleted	1 through 11	Item Barcode, left justified
	12 through 21	ISBN, left justified, blank filled with any punctuation stripped
	22	Discard Flag (uppercase N)

- If you create an output file, the code that identifies your library in that file.
- Whether to save information about the deleted records in Horizon.

The batch delete process lets you delete items linked to copy records. However, even if you have chosen to delete bib records if the item record represents the last copy of the title in your library, Horizon does not delete the bib record if a copy record is still linked to the bib.

You cannot delete item records with these database connections:

- A status of “O” (checked out)
- Referenced in the recall table
- Referenced on an item-specific request
- Referenced on a request pull list
- On reserve

Horizon asks you to verify the deletion if you try to delete item records that are on a pending order, or that have these statuses:

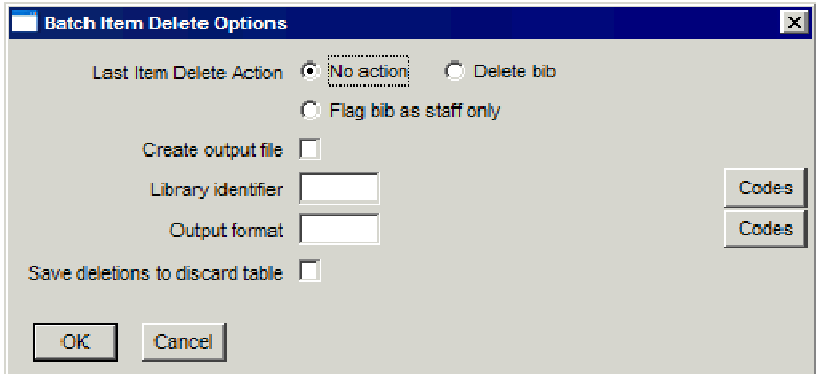
- L (lost)
- C (claimed returned)
- H (being held)

To delete a batch of items

1. Create a list or a group of the item records that you want to delete. (For instructions, see **Creating a List of Item Records to Delete** on page 160.)
2. Choose the items in the list that you want to delete.

   If you want to highlight the entire list, choose **Edit, Select All**.
3. Click **Delete**.

   Horizon opens the Batch Item Delete Options dialog box:



4 If you want to, you can edit these fields:

Field	Action
Last Item Delete Action	Mark one of these options: • If you want to leave the bib record in the database with its current status, mark **No Action**. • If you want to delete a bib record whose last item record is deleted, mark **Delete bib**. • If you want to flag as Staff Only a bib record whose last item record is deleted, mark **Flag bib as staff only**.
Create output file	If you want Horizon to generate a file containing information about the deleted records, mark this box. If you mark this box, you also need to verify or edit the information in the Library Identifier and Output format fields.
Library identifier	Enter or choose the identifying code for your library. This code helps the recipient of the output file determine which library sent the file. If you plan to append new information to an existing file, the library identifying codes must match.
Output format	Enter or choose the type of file encoding that you want to use. There is currently only one valid code that generates an output file (PLAIN). Your system administrator must set up the code before you can choose it. (For instructions, see “Defining a Source Catalog Code” in the “Setting Up Batch Item Delete” section of the *Cataloging Setup Guide*.)
Save deletions to discard table	If you want Horizon to save information about your deleted item records in the database, mark this box. Information stored in the database retains the original barcode and status of the deleted items.

5 When you are satisfied with the settings in the Batch Item Delete Options window, click **OK**.

Note: Clicking Cancel ends the entire delete process, not just the choice of options.

6 If you are creating an output file, Horizon asks for the name of the file. You can do one of these options:

- Enter a new filename.
- Overwrite an existing file.
- Append the new information to an existing file.

Note: You cannot append new information to an existing file that has a different library identification code.

Horizon does these things:

- Displays a message if you have selected item records that cannot be deleted, or that need approval before deletion.
- Deletes the appropriate item records and completes the options you specified.
- Displays a message containing the number of item records that were deleted.

Viewing, Reporting, and Purging Information about Discarded Items

If you choose to save information about deleted items, the Report and Purge Discarded Items process lets you view, export, and print the information.

For example, you can print or export a report containing all library control numbers where the bib was deleted during Batch Item Delete, or where the item is the last copy for the bib record. You could use this report to manually update a union catalog (such as OCLC).

You can permanently delete all of the saved information about deleted item records. You can also choose to permanently delete the information about only some of the items. You may want to review the saved information after a period of time has passed, and delete information when you know that you no longer need it. Your system administrator must give you the rights to do this task.

Report and Purge Discarded Items does not let you retrieve groups created and saved in other parts of Horizon (for example, in Batch Item Delete or Item Group Editor).

To view, report, and purge saved information about discarded items

1 Open the **discarded_item** view in the Table Editor, or start the **Report and Purge Discarded Items** process.

The default location of this process is the **Cataloging\Item Record** folder on the navigation bar.

2 Use one of these search methods to identify the item information that you want to delete:

- A Where clause
- A Compound Search

  You can search on these indexes:

  - **Title**.
  - **Publication date**.
  - **ISBN**.
  - **Local1**. Your system administrator must set this up, and may change the name of the index.
  - **Local2**. Your system administrator must set this up, and may change the name of the index.
  - **Location**.
  - **Call number**.
  - **Copy**.
  - **Last location**. This indicates whether the item is the last copy for the location.
  - **Bib delete**. This indicates whether the bib record was also deleted.
  - **Discard date**. This is the date when the item record was deleted.
  - **Bib number**.
  - **Item number**.
  - **Author**.
  - **LCCN**.
  - **Library control number**.
  - **Barcode**.
  - **Collection**.
  - **Item status**.
  - **Volume**.
  - **Last bib**. This indicates whether the item is the last copy for the entire system.
  - **User**. This is the user ID of the library staff member who discarded the item and deleted the item record.
  - **Source**. This is the source catalog code identified on the import source that you used if Horizon created the item during bib import.
  - **Copy number**.

3. Use the **Sort** and **Display** buttons to choose the information that you want to print or save as a file.
4. Highlight the items whose information you want to print, export, or delete.
5. Do one or more of these options:

- If you want to print the items you chose, choose **File, Print**.
- If you want to save the contents of the list window to a designated file, choose **File, Export Record(s)**.
- If you want to delete the items you chose, choose **File, Delete Record(s)**.

Tracking Item Activity

The Item Activity process lets you track item activity from the time when you create an item record (through import or manual creation) until the item is made available in Circulation. You may want Horizon to track item activity statistics for budgeting reasons. (For example, your library may need to report the number of items that you import from a specific vendor to determine the budget for items from that same vendor in the upcoming year.)

You track item activity beginning with the first status that you assign to an item. You specify the status for which you want Horizon to track cataloging activity. When you import a MARC record and create items for the record, if you have specified that this item has a trackable status, Horizon records activity information for the item.

Your system administrator sets up Horizon to track activity for items beginning with a specific status. Your system administrator also specifies import catalog codes to represent the sources for your imported records. (For more information, see "Setting Up Item Activity Tracking for Imported Records" in the *Cataloging Setup Guide*.)

Horizon tracks this information for each item on the Item Activity report:

- **Item number**. The Horizon-defined item number.
- **Item barcode**. The Horizon-defined item barcode.
- **Source catalog**. The MARC file source for the item.
- **Date received**. The date when you imported the item's MARC record and created item records on import, or the date when you manually created the item record.
- **Circulation date**. The date you checked the item in to Circulation for the first time.
- **Report date**. The last time a report on this item (or a batch of items) was printed.
- **Times printed**. The number of times that you have printed the Item Activity report.
- **Bib number**. The Horizon-defined bib number.
- **Location**. The item's owning location.
- **Collection**. The item's collection.
- **Call number**. The item's call number.
- **Price**. The price of the item.
- **Last Update Date**. The last time you or a staff member modified the item record for the item.

- **Fast add**. Whether you or your staff fast-added the item.
- **Deleted**. Whether you or your staff deleted this item from the report.
- **ITYPE**. The item's ITYPE.
- **Item status**. The item's current status.
- **Status Last Updated**. The date when you or a staff member last updated the item's status.
- **Title**. The item's title.

The information on the activity report can help you determine how long it takes for you to cataloging and process a specific item. Once the item is checked in for the first time, Horizon records this activity to complete the tracking of the newly acquired and newly cataloged item.

Horizon lets you limit the list of items in the List Item Activity window by doing a compound search, a simple search, or using a where clause. This lets you display on one report only those items of a specific status, price, creation date, and so forth. Once you display the items you want on the report, you can sort the list of items, change the display of activities for a specific item that displays by default in the list window, print a summary statistics report for an item or group of items in the report, and export information from the report to a file, such as HTML or text.

This section explains these topics:

- **Displaying Information about Trackable Items** on page 170
- **Using an Item Activity Group** on page 173
- **Printing a Statistical Summary of Item Activity** on page 177
- **Printing an Item Activity Report** on page 178
- **Exporting Item Activity to a File** on page 178

Displaying Information about Trackable Items

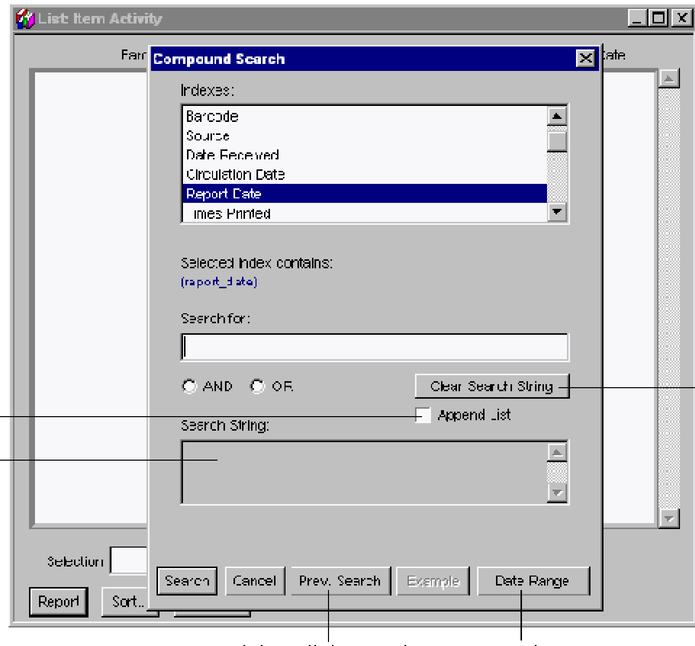
You can view items with activity that you track in the List Item Activity window. You can choose to display a list of items based on a specific type of activity, such as changes in items status, source catalog (the MARC source for the items), date received, circulation date, and so forth.

To display information about trackable items

1 Start the **Item Activity** process.

   The default location of this process is the **Cataloging\Item Record** folder on the navigation bar.

   Horizon opens the List Item Activity window and a Compound Search window:



Mark the Append List box to add new search results to the current ones.

Horizon displays your search string in this field as you build it.

Click here to clear the search string and start a new search.

Prev. Search lists all the search strings that you have entered.

Some indexes give you entry aids. When an Entry Aid is active, the text on the button tells you what kind of aid it can give you, such as Show Codes.

2 Highlight the search index in which you want to search.

You can search for multiple items on these indexes:

- Item number
- Barcode
- Source
- Date Received
- Circulation Date
- Report Date
- Times Printed
- Bib number
- Location
- Collection
- Call Number
- Price
- Last Update Date
- Fast Add
- Deleted
- IType

- Item Status
- Status Last Updated
- Title

3 In the **Search for** field, enter the term or code for which you want to search.

4 If you want to add another search parameter, do one of these options:

- Mark the **AND** button (to limit your search).
- Mark the **OR** button (to expand your search).

5 Continue adding search parameters until you enter all the search parameters that you want.

6 Click **Search.**

Horizon opens the List Item Activity window and displays trackable items that match your search criteria.

Note: If Horizon does not find trackable items in your database matching your search criteria, a Search message box opens telling you that nothing was found. Click **OK** to return to the Compound Search screen and enter new search criteria.

7 If you want to refine your search or start a new search, do one of these options:

To use an SQL statement search	To do a Boolean search
1. Choose **File, Where clause**. If you choose the Where clause option when Horizon is displaying the results of your current search, the parameters for the first search display in the Where clause field. 2. If you want to, do one of these options: • To refine the search results, add to the parameters and click **Search**. • To use different parameters, delete the displayed parameters and start a new search. (For instructions, see “Using a Where Clause to Search for Rows” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide*.)	1. Choose **File, Compound Search**. This lets you perform Boolean searches using the AND and OR operators. If you choose the Compound Search option when Horizon is displaying the results of your current search, Horizon displays the parameters from the first search in the Search String window. 2. If you want to, do one of these options: • To add to the previous search parameters, mark the **Append List** box. Then add to the parameters and click **Search**. • To use different parameters, click **Clear Search String** and start a new search. (For more information, see “Doing a Compound Search” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide*.)

Note: When the List Item Activity window is open, you can choose File and one of the search options at any time to perform new searches or to add to current searches.

Horizon opens the List Item Activity window and displays trackable items that match your search criteria.

If you want to, you can create an Item Activity group of the items in this window.

Using an Item Activity Group

As you track items using the Item Activity process, you may want to organize into groups similar items that you track. This can help you quickly review statistics for similar items. (For example, you can easily see how many days it takes for items with a status of “newly acquired” to go from acquisition to checkout.)

To create an item activity group, you can do any of these things:

- Search for items using the Item Activity process to create a new group. When you search for items, the Item Activity process displays your search results in a list. You can use all of the items on that list as your group, or you can choose items from that list to create a smaller group.
- Use an existing group or list as your group.
- Choose items from an existing group or list to create a group. You can sort and choose items from groups and lists until the group that you want to edit contains only those items that you want it to contain. When you open the Item Activity process, Horizon displays a compound search as its initial search screen. A compound search lets you be more specific about what items go into your group. You can also handpick items from your search results to create your group by highlighting each item that you want.

You can search for multiple items on these indexes:

- Item number
- Barcode
- Source
- Date Received
- Circulation Date
- Report Date
- Times Printed
- Bib number
- Location
- Collection
- Call number
- Price
- Last Update Date
- Fast Add

- Deleted
- IType
- Item Status
- Status Last Updated
- Title

This section explains these topics:

- **Creating a New Item Activity Group** on page 174
- **Using an Existing Item Activity Group** on page 175

Creating a New Item Activity Group

The Item Activity process lets you search for items for which you track activity and put them in a group. You can save these groups, so that the next time you use the Item Activity process, you can quickly display items in a group.

The Item Activity process uses a compound search in its initial screen, but can also search using a simple search screen or where clause. You can also handpick items from your search results to assure that your group contains only those items that you want it to contain. Your group can contain any items in your database that have statuses you track. Your system administrator specifies the item statuses that Horizon tracks.

To create a new item activity group

1 Start the **Item Activity** process.

The default location of this process is the **Cataloging\Item Record** folder on the navigation bar.

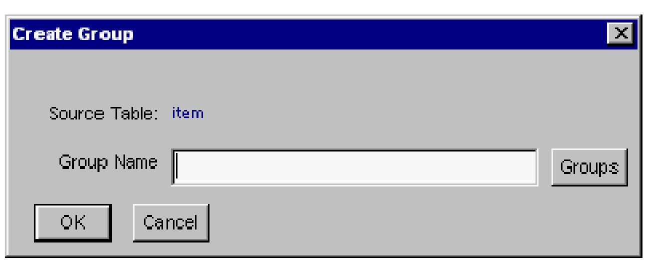
2 Search for and display items that you want to include in your item activity group using a Compound Search, Simple Search, or Where Clause. (For instructions, see **Displaying Information about Trackable Items** on page 170.)

3 Highlight the items in the List Item Activity window that you want to include in your new group.

To highlight the entire list, choose **Edit, Select All**.

4 Choose **Group, Create Group**.

Horizon opens the Create Group dialog box:



If you have previously retrieved or created a group during this session, Horizon displays the name of that group in the Group Name field.

5 Enter a new name for the group in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.

6 Click **OK**.

Horizon returns to the List Item Activity window.

You can now export the items in the list to a file (such as HTML or text), or print a summary report of activity on the items.

Using an Existing Item Activity Group

The Item Activity process saves the groups that you create. Once you display items in a specific group, you can sort the items, change the type of activity that displays for the items, or even choose from items in existing groups to create additional groups.

A group created by someone else may have been created for a specific reason. Do not make any changes to a group or the items in it without checking with the person who created it. (For more information, see your system administrator.)

To use an existing item activity group

1 If the List Item Activity window is not open, do these steps:

a Start the **Item Activity** process.

The default location of this process is the **Cataloging\Item Record** folder on the navigation bar.

Horizon opens the List Item Activity window and a Compound Search window.

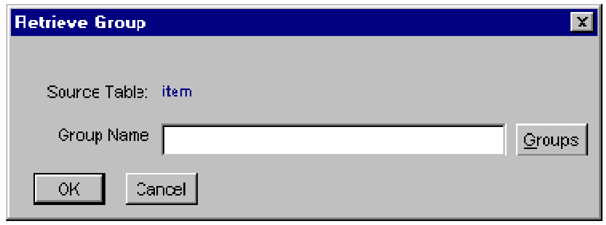
b Click **Cancel**.

Horizon displays an empty List Item Activity window.

2 If Horizon already displays the List Item Activity window, choose **Group, Retrieve Group**.

Note: When you retrieve an existing group, Horizon replaces any existing data in the List Item Activity window. Make sure that you finish working with any existing data in the List Item Activity window before retrieving a group.

Horizon opens the Retrieve Group dialog box:



3 In the **Group Name** field, enter the name of the saved group that you want to use, or click **Groups** to choose from a list of existing groups.

Important: If you click Groups to display a list of existing groups, Horizon displays a list of all groups that you or another staff member have created using the Item Activity process as well as the Item Group Editor. Make sure you do not try to use groups that you created using the Item Group Editor.

The Item Activity process will only display items with statuses that your system administrator has specified as trackable. If you choose a group created using the Item Group Editor, Horizon displays only those items that have a trackable status. If no items in the group have a trackable status, no items will display when you display the List Item Activity window.

4 Click **OK**.

Horizon displays the group items in the List Item Activity window.

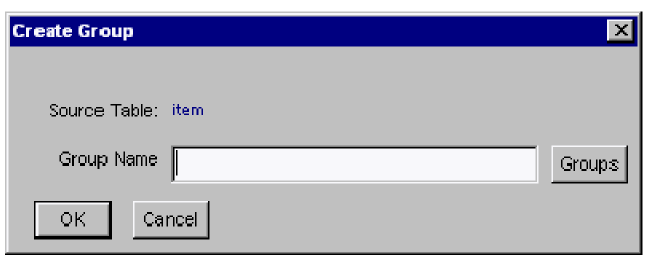
5 If you want to leave the original group unchanged, do these steps:

a Choose items from the group to create a new group.

To highlight the entire list, choose **Edit, Select All**.

b Choose **Group, Create Group** to save the items you chose as a new group.

Horizon opens the Create Group dialog box:



If you have previously opened a group during this session, Horizon displays the name of that group in the Group Name field.

c Enter a new name in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.

d Click **OK**.

Horizon saves a second copy of the group under the new name.

You can now choose to do these tasks:

- See "Printing a Statistical Summary of Item Activity"
- See "Printing an Item Activity Report"
- See "Exporting Item Activity to a File"

Printing a Statistical Summary of Item Activity

You can print a statistical summary report of any items or group of items for which you track activity. One of the main purposes of the statistical report is to help you determine how long it takes for a newly acquired item from a specific source catalog (MARC vendor) to go from the acquisitions process to circulation.

This item activity statistical summary report lists this information for the group of items that you have displayed in the List Item Activity window:

- Total number of items from a specific source catalog.
- Total number of days the item had an “In Cataloging” status for each source catalog.
- Average number of days the item had an “In Cataloging” status for each source catalog.
- Total number of items from all source catalogs.
- Total number of days items had an “In Cataloging” status for all source catalogs.
- Average number of days items had an “In Cataloging” status for all source catalogs.

To print a statistical report of item activity

1 Do one of these options:

- Search for and display the **List Item Activity** window for the items for which you want to print the statistical report. (For instructions, see **Displaying Information about Trackable Items** on page 170.)
- Display items for the report from an existing Item Activity group in the List Item Activity window. (For instructions, see **Using an Existing Item Activity Group** on page 175.)
- Display items for the report in the List Item Activity window by creating a new Item Activity group. (For instructions, see **Creating a New Item Activity Group** on page 174.)

2 Highlight the items with statistics that you want to print out on the report. (To highlight the entire list, choose **Edit, Select All**.)

3 Click **Report**.

Horizon displays a print dialog.

4 Specify the font and number of copies that you want to print.

5 Click **OK**.

Horizon prints the statistical summary report for the selected items.

Printing an Item Activity Report

When you print an Item Activity report, you print all activity information for all items you currently have displayed in the List Item Activity window.

To print an Item Activity report

1. Do one of these options:

   - Search for and display the **List Item Activity** window for the items for which you want to print a report. (For instructions, see **Displaying Information about Trackable Items** on page 170.)
   - Display items for which you want to print a report from an existing Item Activity group in the List Item Activity window. (For instructions, see **Using an Existing Item Activity Group** on page 175.)
   - Display items for which you want to print a report in the List Item Activity window by creating a new Item Activity group. (For instructions, see **Creating a New Item Activity Group** on page 174.)

2. Choose **File, Print**.

   Horizon displays a Print dialog box.

3. Specify the font and number of copies that you want to print.
4. Click **OK**.

   Horizon prints the Item Activity Report for all items in the List Item Activity window.

Exporting Item Activity to a File

You can export item activity to a file. You may want to do this to put data from the file into a spreadsheet program or into another format, such as HTML. When you export item activity to a file, you export all activity information for all items that you currently have displayed in the List Item Activity window.

To export item activity to a file

1. Do one of these options:

   - Search for and display the **List Item Activity** window for the items that you want to export to a file. (For instructions, see **Displaying Information about Trackable Items** on page 170.)
   - Display items to export to a file from an existing Item Activity group in the List Item Activity window. (For instructions, see **Using an Existing Item Group** on page 163.)
   - Display items to export to a file in the List Item Activity window by creating a new Item Activity group. (For instructions, see **Creating a New Item Activity Group** on page 174.)

2. Choose **File, Export Record(s)**.

Horizon displays a Save to a File dialog box.

3 Save the file.

Working with Copy Records

If you have sets of books, serials, or multiple but identical copies of a single item, you may want to create copy records in order to group related item records together. This can keep Horizon from displaying long, confusing lists of the same title on a search results window. Copy records must always be created and edited manually.

This section explains these topics:

- **Creating a Copy Record** on page 179
- **Displaying Information about Trackable Items** on page 170
- **Editing a Copy Record** on page 183
- **Deleting a Copy Record** on page 184

Creating a Copy Record

You can create a copy record from scratch for a bib record that has no items attached to it yet or for a bib record with items already attached. Either process uses the same steps. Your system administrator can set up Horizon to automatically fill the call number field. You can also create copy records by copying them.

When you create serial copy records from Cataloging, the checkin priority of issues is 255. This is the lowest possible priority. The top priority is 1. (The priority determines which branch gets a copy first if you receive less than a full shipment.) (For more information, see the *Serials Guide*.)

This section explains these topics:

- **Creating a Copy Record from Scratch** on page 179
- **Copying a Copy Record** on page 181
- **Automatically Filling the Call Number Field in a New Copy Record** on page 182

Creating a Copy Record from Scratch

When you create a copy record to attach to a bib record that has existing item records, Horizon attaches all the item records to that copy record. When you create additional copy records, you can move the items from the first copy record by using the Relink Items command. (For instructions, see **Moving an Item Record** on page 186.)

To create a copy record from scratch

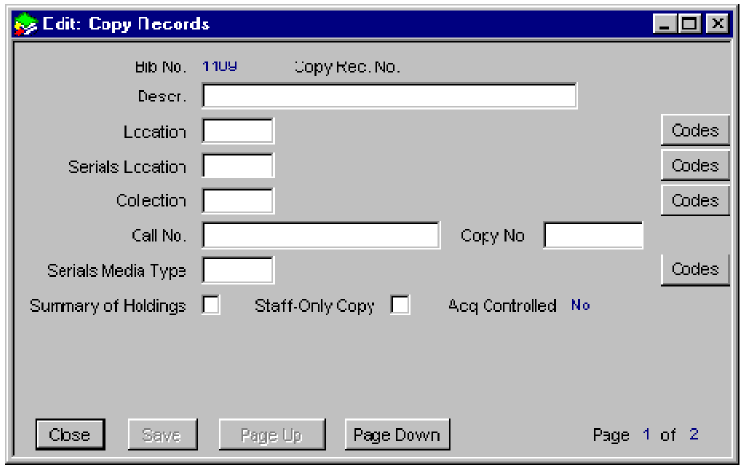
1 Open the bib record to which you want to attach a copy record.

2 Choose **Marc, Copy Records.**

Horizon displays the List Copies window.

3 Click **New.**

Horizon displays an Edit Copy Records window:



4 Complete these fields, as necessary:

Field	Action
Descr.	Enter the description of the copy record.
Location	Enter the location of the copy record. This specifies where the copy (or set of items) is housed.
Serials Location	Enter the serials location. This is the location that checks in issues and handles claims for this serial copy record.
Collection	Enter the collection. The collection reflects the form or content of the copy.
Call No.	Enter the call number.
Copy No.	Enter the copy number. This is the number you assign to the copy record. It is different from the system-assigned number, which differentiates between a particular “Copy No.” in one branch and that same “Copy No.” in another branch.
Serials Media Type	Enter the serial’s media type.

Field	Action
Summary of Holdings	Mark this box if you want Horizon to display the copy record in the Summary of Holdings window. (For more information, see **Working with a Summary of Holdings for Serials Titles** on page 191.)
Staff-Only Copy	If you mark this box, only staff can view the item on a search results screen. If you leave this box unmarked, the public can view the item on a search results screen. **Note:** The Staff-Only feature works only if your library has set up Public-Only indexes. (For help in setting up Public-Only indexes, contact Customer Support. There may be a charge for this service.)
Staff Note	Enter a note for staff members. Press **CTRL+ENTER** to move to the next line. A staff note displays only in a copy record.

5 Save your changes.

If no items are attached directly to the bib record, the task is finished.

If items are attached directly to the bib record, Horizon displays a dialog box asking if you want to update items with the new copy information, including location, collection, call number, copy number, and call type.

6 Do one of these options:

- If you want to attach the item to the copy record, and store the new copy record information on the item record, click **Yes**.
- If you want to attach the item to the copy record, but you do *not* want to store the new copy record information on the item record, click **No**.

Horizon attaches the item to the copy record.

Copying a Copy Record

You can create a new copy record by copying and editing an existing copy record. When you copy a copy record, you can also duplicate all the item records associated with that copy record.

To copy a copy record

1 Open the List Copy Records window that has the copy record that you want to copy. (For instructions, see **Displaying Information about Trackable Items** on page 170.)

2 Highlight the copy record that you want to copy.

3 Choose **File, Copy Record**.

Horizon displays a copy of the record that you chose with a blank Copy No. field.

4 Edit the copy record in some way so that you can save it as new.

Horizon cannot save an identical copy record. (For instructions on what information belongs in each field, see **Creating Item Records** on page 143.)

5 Save your changes.

Horizon opens a message box that asks if you want to duplicate the items associated with that copy record.

6 Choose one of these options:

- If you want Horizon to copy the copy record and the existing items, and attach the duplicated items to the copy record before returning to the Edit Copy Records window, click **Yes**.
- If you want Horizon to copy only the copy record before returning to the Edit Copy Records window, click **No**.

If you duplicated the items as well as the copy record, Horizon updates the Count column with the items after you close and reopen the copy list.

Automatically Filling the Call Number Field in a New Copy Record

Horizon can automatically fill the call number field when you create a new copy record in Cataloging. This can cut down on the number of keystrokes needed to create a new record. You can edit an automatically-filled call number field in the same way that you edit any other field. Your system administrator must set this up. (For instructions, see “Automatically Filling the Call Number Field in a New Item or Copy Record” in the “Setting Up Call Numbers” section of the *Cataloging Setup Guide*.)

Horizon uses the call number information from the bib record to automatically fill a new copy record call number field. If you add item records to the copy record, Horizon uses the call number information from the copy record to automatically fill the call number field in the item record. If you change the copy record call number before you create a new item record, the item record uses the changed copy record’s call number. If you change the bib or copy record call number after you create the item record, Horizon gives you the choice to change any attached copy or item record call numbers.

Horizon cannot automatically fill call number fields in new copy records when you create multiple copy records by copying an existing copy record. However, if you copy a single copy record, Horizon uses the information from the copy record that you copy to fill the call number field on the copy record that you create. Horizon also copies any attached item records and keeps their call numbers, unless you change the new copy record call number. Then Horizon asks if you want to also change the item record call numbers. (For more information, see **Copying a Copy Record** on page 181.)

Your system administrator can also set up a default call number that automatically displays in every copy record that you create. This can help if you want to create a large number of records that use the same call number. This default call number overrides any automatic fill settings. (For more information, see “Defining a Default Value for a Call Number” in the “Setting Up Call Numbers” section of the *Cataloging Setup Guide*.)

Opening a Copy Record

You open a copy record through the bib record that it is attached to. However, you can open only one copy record through a bib record at a time. You can also open a copy record from a staff search results window.

To open a copy record from a bib record

1 Open the bib record to which the copy record is attached.

2 Choose **Marc, Copy Records**.

Horizon displays the List Copy Records window.

3 Double-click the copy that you want to open.

Horizon opens the Edit Copy Records window for the copy that you double-clicked.

To open a copy record from staff search

1 Start a **New Search**.

To do this, press **F4** or find the process in the **Searching** folder on the navigation bar.

2 Search for an item with the copy record you want to open.

Highlight the item.

3 Press **F10** or choose **Edit, Send To**.

4 Highlight **Copy/Item List**.

5 Click **OK**.

Horizon opens the List Copy Records window in the MARC Editor.

Editing a Copy Record

You can edit any field in a copy record. You can have Horizon update any attached item records with the changes that you make in the copy record.

To edit a copy record

1 Open the copy record that you want to edit. (For instructions, see **Displaying Information about Trackable Items** on page 170.)

2 Edit any field in the copy record.

If the field requires a predefined value, click **Codes** to the right of that field to view a list of valid options. (For a description of each field, see **Creating a Copy Record** on page 179.)

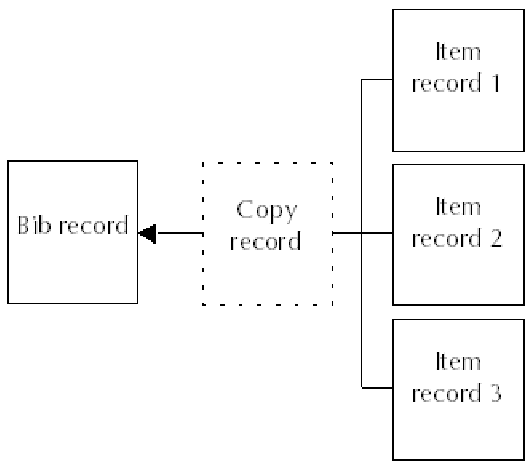
3 Save your changes.

4 If Horizon displays a message asking if you want to update items associated with the duplicated copy, do one of these options:

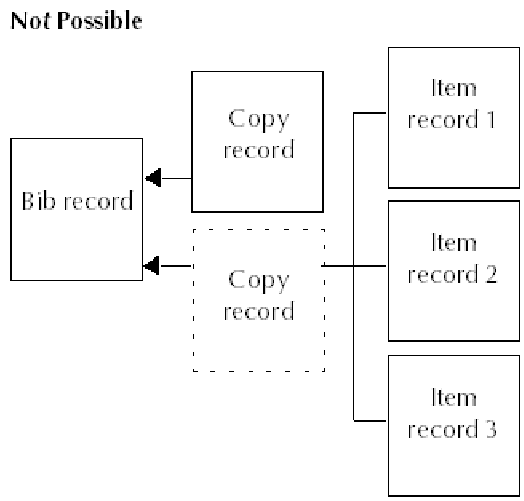
- If you want to store the new copy record information on the item record, click **Yes**.
- If you do *not* want to store the new copy record information on the item record, click **No**.

Deleting a Copy Record

You can delete copy records. Item records that are attached to a copy record that you delete automatically reattach to the bib record. This figure illustrates item records that reattach to the bib record after the copy record is deleted:



However, if a bib record has more than one copy record with items, the item records cannot reattach to the bib record. This is because a bib record cannot have both copy records and item records attached to it, as illustrated:



If you try to delete a copy record and reattach the items to the bib record while other copy records exist, Horizon prompts you to either delete the item records or attach them to a different copy record. (For more information, see **Moving an Item Record** on page 186.)

To delete a copy record

1. Open the List Copy Records window that has the copy record that you want to delete. (For instructions, see **Displaying Information about Trackable Items** on page 170.)
2. Highlight the copy record you want to delete.
3. Choose **File, Delete Record.**

   Horizon displays a dialog box that asks if it is OK to delete the selected record.
4. Click **OK**.

   If item records are attached to the copy record that you are deleting, Horizon displays a dialog box that asks if you want to delete the items that were attached to that copy record.
5. Do one of these options:

If you are deleting this	Do one of these options
The only copy record attached to the bib record	• If you want to delete the item records attached to the copy record, click **Yes**. • If you want to reattach the item records to the bib record, click **No**.

If you are deleting this	Do one of these options
One of two or more copy records attached to the bib record	• If you want to delete the item records attached to the copy record, click **Yes**. • If you do *not* want to delete the item records attached to the copy record, click **No**. Horizon cancels the procedure and informs you that attached items must be deleted before the copy can be deleted. Click **OK**. **Note:** You can move items to a different copy record and then delete the copy record. (For instructions, see **Moving an Item Record** on page 186.)

Horizon returns to the List Copy Records window.

Moving Item and Copy Records

Horizon lets you move item records to different bib or copy records. It also lets you move copy records to different bib records. When you move a copy record, you also move any item records attached to it.

This section explains these topics:

Moving an Item Record

You can move an item record from one bib or copy record to another bib or copy record. You can do this only if the item record has no specific reference to other functionality in Horizon.

Moving item records lets you do these things:

- Group item records and attach them to the bib or copy records to which they "belong."
- Delete a copy record without deleting its item records. You can move the attached items to a different copy record, and then delete the copy record without items. (If only one copy record exists, you can delete it and choose to reattach the items to the bib record.)

When you move an item record, Horizon breaks the existing link between the item record and its bib or copy record and relinks the item record to the bib or copy record that you choose. However, Horizon maintains all the transactions associated with the item record, such as those in Circulation.

Constraints

- Horizon may not always let you relink an item record. Instead, Horizon displays an appropriate error message. For example, you cannot relink under these circumstances:
  - The specific item is an entry on the request pull list.
  - Relinking would generate a duplicate unique index entry.
  - The item record was created in Serials prediction and checkin.
  - Uploading off-line circulation transactions from Offline Circulation (formerly PC Reliance) generates an error that is recorded in the reliance_exc table. You cannot relink the item record referenced by the error.
  - If an item-specific or non-item-specific CSA request has been filled either manually or automatically.
  - The item is on hold for a borrower.
- You can relink item records created in Acquisitions in these situations:
  - You want to move one or more PO line items to a different copy on the same bib.
  - You want to relink all PO line items directly to a different bib.
  - You want to relink all PO line items through a different copy for another bib.

  If you try to relink only some of the items that are attached to a single PO line to a different bib record, Horizon displays a dialog box. You must either choose to relink all items or cancel the relink process.

  If not all of the items on a PO line are received, invoiced, or canceled, Horizon asks you to verify that you want to continue with the relinking process before performing the relink. Horizon displays item activity (such as approved or received) to help you decide if you want to continue relinking based on the stage of order processing.
- You can relink item records with a requested status in these situations:
  - An item has been booked through Advanced Booking or Media Scheduling.
  - A borrower has requested an item (either an item-specific or a non-item-specific request).
  - A borrower has requested an item in Closed Stack Access (CSA).

  If the item record you are relinking is the only item record linked to the relinked-from bib record, Horizon moves any non-item-specific requests on the relinked-from bib to the relinked-to bib and reorders the hold list.

  If the item you are relinking is the last item available to fill a request, all requests are transferred to the relinked-to bib record. Horizon merges regular (non_CSA) request lists based on the queue order for each bib. You can choose to review and change this queue order. (For instructions, see “Reordering the Hold Request Queue” in the “Hold Requests” chapter of the *Circulation Guide*.)

These relinking situations apply only to the Relink Items function. They do not apply to the Relink Copies function (automatically relinking items attached to a copy when a copy is relinked to another bib).

When you move an item record, Horizon maintains all the transactions associated with the item record, such as those in Circulation.

To move an item record

1 Open the bib record to which you want to move the items.

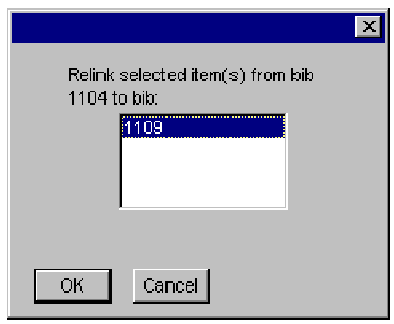
If you want to move the items to a copy record, open the bib record to which the copy record is attached.

2 Open the List Items window for the items that you want to move. (For instructions, see **Opening a List of Items** on page 136.)

3 Highlight the items that you want to move.

4 Choose **Items, Relink Items**.

Horizon opens a relink dialog box:



5 Highlight the bib record to which you want to move the item records.

If you are moving the item to a copy record, highlight the bib record to which the copy is attached.

6 Click **OK**.

7 Do one of these options:

If this happens	Do this
If the bib record to which you are moving the item has one or no copy records attached, the item record links to the new bib or copy record.	The task is finished.

If this happens	Do this
If the bib record to which you are moving the item has more than one copy record attached, Horizon displays the Select a Copy dialog box.	1. Highlight the copy record to which you want to link the item. 2. Click **OK**. The item record links to the copy record.
If the item is referenced anywhere in the database, Horizon displays an error message similar to this one:  **Note:** An item is referenced if someone has placed an item-specific request for it, if the item is booked in Advanced Booking, or if the item is referenced in any other database table.	You must remove the reference from the table before you can move the record. To do this, do these steps: 1. Click **OK** to close the message box. 2. Close all open windows. 3. Remove the database reference.(For example, you may need to remove an item-specific request.) 4. Repeat this task.

Note: When you reopen the bib or copy record to which you attached the item, the record reflects the changes in the List Items window and in the Count column in the List Copies window.

Moving a Copy Record

You can move a copy record from one bib record to another bib record. Items that are attached to that copy record move with it.

You cannot move a copy record to a bib record that already has items attached directly to it unless you do one of these things:

- Move the items from the second bib record to the copy record that you want to move before you move the copy record.
- Create a temporary copy record in the second bib record and attach the existing item records to it. Move the copy record you want to move. Then move the item records to the moved copy record and delete the temporary copy record.

(For more information, see **Moving an Item Record** on page 186.)

Moving a copy record lets you correct errors when copy records are attached to the wrong bib record. It also lets you transfer all the copies and items to a new bib record if the bib record they are attached to changes. (For example, if a magazine changes its name, you could create a new bib record and then move the copy record to the new bib record.)

To move a copy record

1 Open the bib record to which you want to move the copy record.

2 Open the bib record to which the copy record is attached.

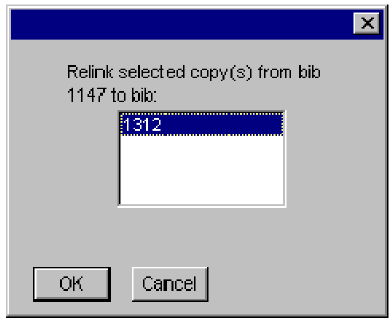
3 Choose **Marc, Copy Records**.

Horizon displays the List Copy Records window.

4 Highlight the copies in the List Copy Records window that you want to move.

5 Choose **Copies, Relink Copies**.

Horizon opens this dialog box:

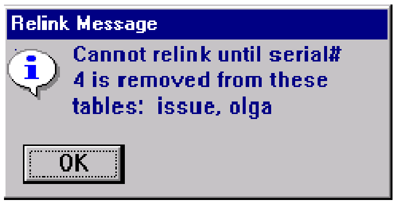


6 Highlight the number of the bib record to which you want to move the copy.

7 Click **OK**.

8 Do one of these options:

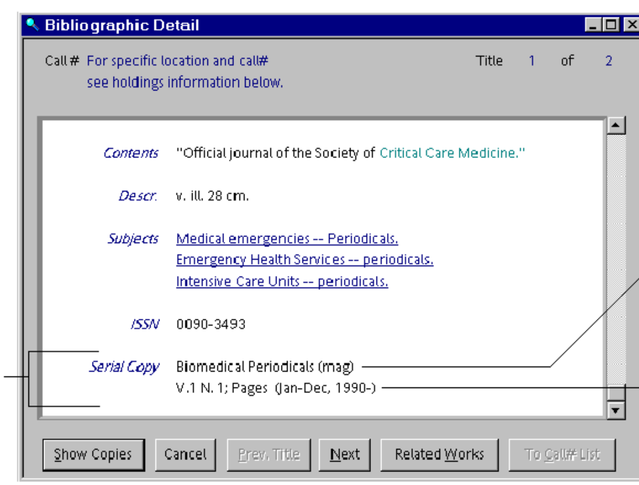
If this happens	Do this
The copy record links to the new bib record, and Horizon opens the List Copy Records window.	The task is finished. Close all open records. **Note:** Horizon displays the number of copies in the header only after you close the bib record and reopen it.

If this happens	Do this
If the copy record is referenced anywhere in the database, Horizon displays an error message similar to this one:  	You must remove the reference from the listed tables before you can move the copy record. To do this, do these steps: 1. Click **OK** to close the message box. 2. Close all open records. 3. Remove the database reference. A copy record is most often referenced in the olga and issue tables. (For information on deleting references from the olga table, see "Deleting a Prediction Setup" in the "Prediction Setup" chapter of the *Serials Guide*. For information on deleting references from the issue table, see "Deleting an Issue" in the "Checking In Issues" chapter of the *Serials Guide*.) **Note:** If you have problems deleting record references from tables, contact Horizon your system administrator. 4. Repeat this task.

Working with a Summary of Holdings for Serials Titles

You can use Cataloging to maintain a summary of holdings for the serials titles that your library receives. You can have this summary display only the collection and serials media type for each serials copy. You can also add the chronology and enumeration of each serial. You need to set up each copy record that you want to display this information.

Once you have prepared the copy records, the Bibliographic Detail search window displays the serials information:



Summary of Holdings

The first line displays as soon as you mark the Summary of Holdings box. (For instructions, see "Setting Up a Copy Record to Display a Summary of Holdings" on page 6-62.)

You must use Serials Checkin or manually enter enumeration and chronology to display subsequent lines. (For more information, see "Editing a Summary of Holdings" on page 6-65.)

If your library uses Horizon Serials, the summary of holdings information is generated from Serials Checkin. If you add information through Cataloging, you may create duplicate entries. However, even if you have Serials installed, you can still use summary of holdings in Cataloging in these circumstances:

To add serials holdings information for serials that your library owned before you implemented Serials

To add serials holdings not in Serials Control

To update summary of holdings information generated in Serials

(For more information about using summary of holdings with Serials, see the "Summary of Holdings" chapter in the *Serials Guide*. For more information on purchasing Serials, contact your Horizon sales representative.)

This section explains these topics:

Setting Up a Copy Record to Display a Summary of Holdings

Before any serials holdings information can display in search results windows, you must add certain information to each serial copy record for which you want to maintain a summary of holdings.

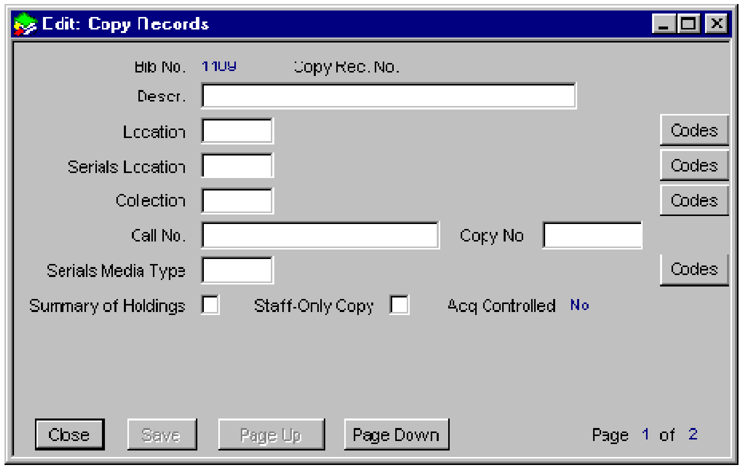
To set up a copy record to display a summary of holdings

1 Do one of these options:

- Open the copy record for which you want to display a summary of holdings.
- Do these steps to create a new copy record:
  - Open the bib record to which you want to attach a copy record.
  - Choose **Marc, Copy Records.**

    Horizon displays the List Copies window.
  - Click **New.**

Horizon displays the edit copy records window:



2 Use this table to enter the required fields for serials summary of holdings (click **Codes** after any field for a list of valid options):

Field	Action
Location	Enter the location of the copy record. This specifies where the copy (or set of items) is housed.
Collection	Enter the collection. The collection reflects the form or content of the copy.
Serials Media Type	Enter the serial's media type.

3 Mark the **Summary of Holdings** box.

4 Enter any other information that you want.

Note: If you have more than one location where you keep serials, your system administrator may also need to specify which location's holdings information you can display in your PAC. (For instructions, see "PAC Primary and Secondary Locations" in the "Searching Setup" chapter of the *System Administration Guide*.)

Once you have marked the Summary of Holdings box on a copy record, the collection and the media type that you designate for the copy displays in search results windows. If you want more information to display, you can manually add call numbers, enumeration, chronology, and notes to the copy record. You can also edit existing information. (For more information, see **Editing a Summary of Holdings** on page 196.)

Opening the Summary of Holdings Window

You open the summary of holdings window from the List Copies window.

To open the Summary of Holdings window

1 Open the bib record for whose copy you want to edit the summary of holdings.

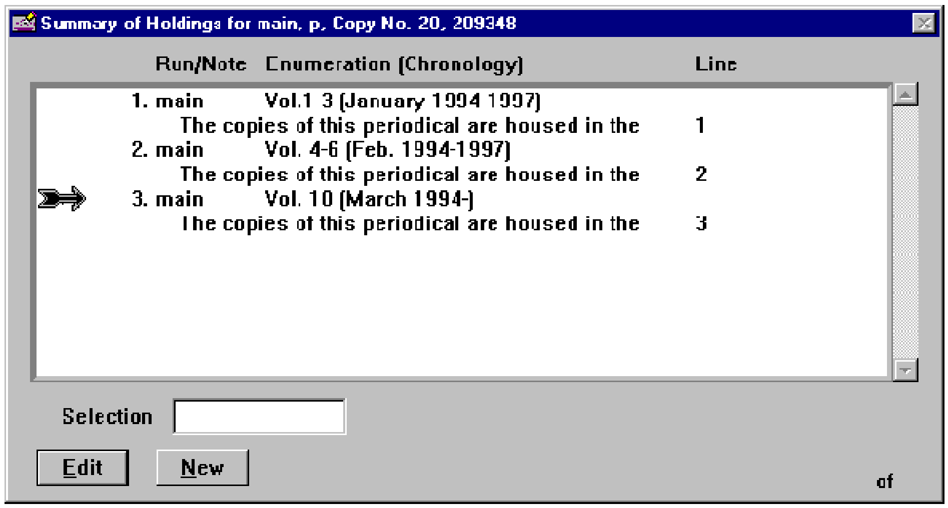
2 Choose **Marc, Copy Records**.

Horizon opens the List Copies window.

3 Highlight the copy for which you want to view the summary of holdings.

4 Click **Sum. of Hldgs**.

Horizon opens the Summary of Holdings window:



Changing Information for a Summary

You can change information for a summary of holdings display by doing one or more of these tasks:

- **HorizonAdding an Entry to the Summary of Holdings Window** on page 194
- **Editing a Summary of Holdings** on page 196
- **Deleting Information in a Summary of Holdings** on page 197

HorizonAdding an Entry to the Summary of Holdings Window

Once you have marked the Summary of Holdings box on a copy record, the collection and the media type that you designate for the copy displays in PAC. If you want more information to display, you can manually add an entry to a copy's summary of holdings. You might add an entry when you add a yearbook to an encyclopedia set, or when you receive a volume of a set being published as a standing order.

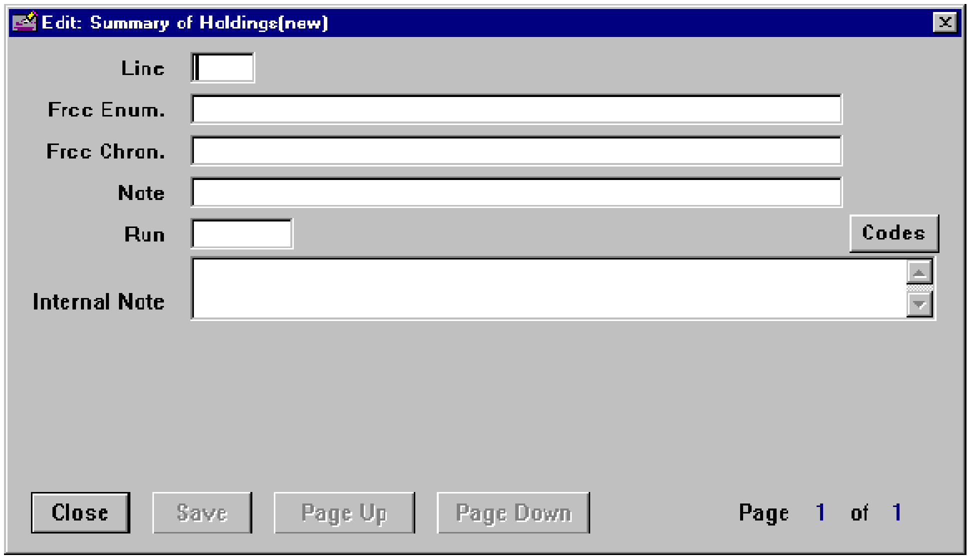
If you use Serials Checkin, be sure that you are not duplicating serial information in the Summary of Holdings window by adding it in both Cataloging and Serials Checkin. (For more information about Serials Checkin, see the *Serials Guide*.)

To add an entry to the Summary of Holdings window

1 Open the Summary of Holdings window to which you want to add an entry. (For instructions, see **Opening the Summary of Holdings Window** on page 193.)

2 Click **New**.

Horizon opens an empty Edit Summary of Holdings window:



3 Complete the fields on the Summary of Holdings window:

In this field	Do this
Line	Enter the number or order in which you want the holdings displayed in search results windows.
Free Enum.	Enter the enumeration information if any exists. (For example, enter the volume, number, and issue number of a periodical.)
Free Chron.	Enter the chronology information if any exists. (For example, chronology information could be "Special Supplement 1980-1984".)
Note	Enter any comments about the line of holdings.
Run	Enter the run to which the issue belongs. Click **Codes** for a list of valid options.
Internal Note	Enter any additional comments about the line of holdings. This information displays only in the Itme Detail Status window. (For more information, see **Viewing Detailed Information about an Item** on page 142.)

4 Save your changes.

Horizon reopens the Summary of Holdings window and includes the entry that you added.

Editing a Summary of Holdings

Once you have marked the Summary of Holdings box on a copy record, the collection and the media type that you designate for the copy displays in search results windows. You can add enumeration, chronology, and notes to a summary of holdings. You can also edit existing information. Any changes that you make display in the Bibliographic Detail search window.

If your library uses Horizon Serials, changes that you make in a summary of holdings through Cataloging also display in the Serials summary of holdings. Adding information through Cataloging may cause duplicate entries. (For more information on Horizon Serials, see the *Serials Guide*.)

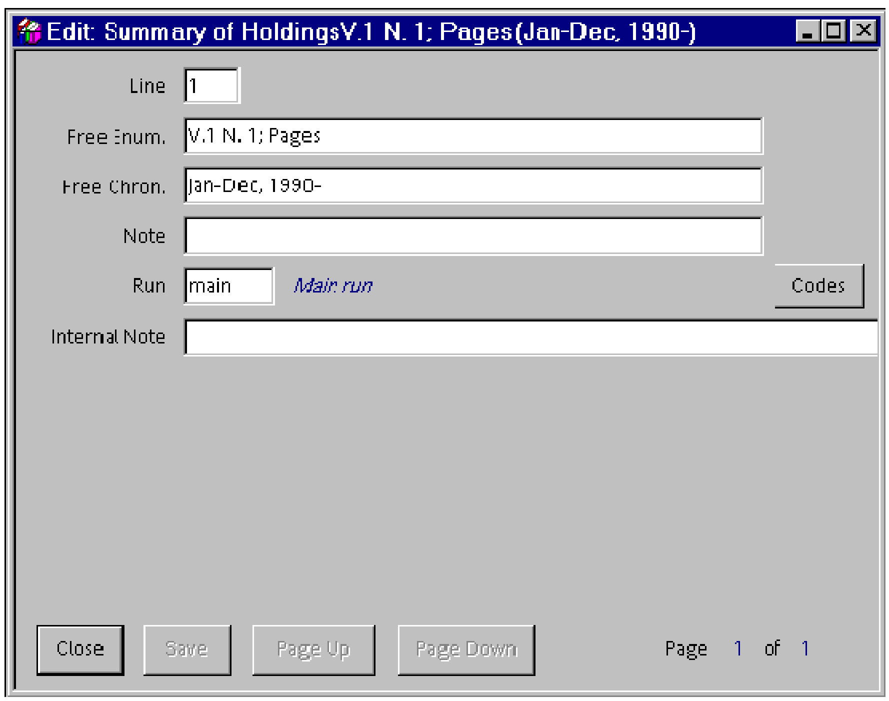
To edit an existing summary of holdings

1 Open the Summary of Holdings window for the copy that you want to edit. (For instructions, see **Opening the Summary of Holdings Window** on page 193.)

2 Highlight the summary of holdings entry that you want to edit.

3 Click **Edit**.

Horizon displays the Edit Summary of Holdings window:



Note: If your library uses Horizon Serials to generate summary of holdings information, the Edit Summary of Holdings window displays differently. (For instructions on editing a summary of holdings when you use Serials, see the "Summary of Holdings" chapter in the *Serials Guide*.)

4 Edit the fields as necessary.

Note: If the summary of holdings should be changed for all copies of an issue, you need to edit each copy record.

5 Save your changes.

Horizon reopens the Summary of Holdings window.

Deleting Information in a Summary of Holdings

You can delete part or all of the holdings that you have listed for a serial. You might want to do this when your library no longer houses issues represented by the line of holdings.

Deleting information from a summary of holdings affects only holdings information displayed in the Bibliographic Detail search window. If item records also exist for these issues, you must delete these records in Cataloging in order to remove them from display in the Copies List search window. (For instructions, see **Deleting a Single Item Record** on page 157.)

To delete information in a summary of holdings

1 Open the Summary of Holdings window for the copy that you want to edit. (For instructions, see **Opening the Summary of Holdings Window** on page 193.)

2 Highlight the summary of holdings entry that you want to delete.

Note: If you want to delete summary of holdings information for all copies of an issue, you need to perform these steps for each copy record.

3 Choose **File, Delete**.

Horizon prompts you to verify the deletion.

4 Click **OK**.

Horizon deletes the row of holdings. Search windows immediately reflect this change.

5 Close any open windows that you no longer want to use.

Using Item Group Editor

On occasion, you may need to change the information in a specific field for multiple item records. (For example, before moving a group of items to a new location, you need to change the location field on every item record so borrowers can find the items.) You can change the information in one or more fields for multiple item records by using Item Group Editor.

Item Group Editor lets you archive, edit, and restore data that relates to a group of items. To use Item Group Editor, you first create a group of items (called an item group, or group) by searching for items that match your specific criteria. You archive information about those items to keep a copy of the information you originally cataloged. Then you can change the data in certain fields of the whole group at once. These changes can be temporary or permanent. If they are temporary, when the time to use those temporary changes has passed, you restore the archived, original information.

You can edit information in these fields for a group of items:

- Item Type
- Location
- Collection
- Call Type
- Call No.
- Source
- Price
- Item Note
- Item Status
- Internal Note

If you cannot edit item statuses, you may need to have this feature activated. (For more information, see your system administrator.)

If you want to change only item statuses, you can use the Item Group Editor–Status Only process. (For more information, see “Changing Item Statuses” in the “Borrower and Item Records” chapter of the *Circulation Guide*.)

Horizon links some item statuses to specific records. You cannot change these statuses in Item Group Editor; they are protected. You need to change them in the appropriate Horizon process, such as Circulation.

Here is an example of how your library can use Item Group Editor. A professor wants to put certain items on reserve. These items may include documents, books, videos, or any other items from any of your library’s locations. You can create a group made up of these items in Item Group Editor and archive the group’s original cataloging information. You can use Item Group Editor to change all the call numbers so that they direct borrowers to the reserve stacks. Then you move the items to the reserve shelves. If the professor wants students to be able to check out some of the items in his list for only three hours and others for overnight, you can use Item Group Editor to change the ITYPEs to reflect the different checkout periods. When the professor no longer wants any of the items held on reserve, you can restore the archived list that contains the general stack call numbers and regular ITYPE information and reshelf the items in the general stacks. Then you can clear the archive and delete the group so that it is not inadvertently used at a later time.

You can use Item Group Editor when you do tasks such as these:

- Loan a group of items to another agency.
- Transfer materials permanently to a new location.

- Make a group of items available for reserve only.
- Make a group of items available for media scheduling.
- Change fine rates for a group of items.
- Change the loan period for a group of popular items such as holiday books during peak times.
- Choose items for Home Service users.
- Change groups of call numbers.
- Add local notes to items.
- Correct default information.
- Change or identify a purchasing source.
- Change the collection code of a section of items so borrowers cannot check them out during inventory.
- Change the price on a group of journals.

The default location of the Item Group Editor is the Administration\Group Editor Menu folder on the navigation bar.

This section explains these topics:

- **Creating an Item Group** on page 199
- **Archiving Information about an Item Group** on page 205
- **Editing Information about an Item Group** on page 206
- **Restoring Information about an Item Group** on page 209
- **Clearing Archived Information about an Item Group** on page 211

Creating an Item Group

Before you can use Item Group Editor to archive or edit information about the items in a group, you may need to create an item group. An item group can contain any items that exist in your library's database. To create an item group, you can do any of these things:

- Search for items in Item Group Editor and create a new group. When you search for items, Item Group Editor displays your search results in a list. You can use all the items on that list as your group, or you can choose items from that list to create a smaller group.
- Use an existing group or list as your group.
- Choose items from an existing group or list to create a group. You can sort and choose items from groups and lists until the group that you want to edit contains only those items that you want it to contain. When you open Item Group Editor, Horizon displays a compound search as its initial search screen. A compound search lets you be more specific about what items go into your group. You can also handpick items from your search results to create your group by highlighting each item that you want.

You can search for multiple items on these indexes:

- Barcode
- bib#
- item#
- Location
- Collection
- Call No.
- Source
- Price
- Item Status
- Notes
- IType

When you highlight certain indexes, the Entry Aid button on the Compound Search window changes to “Show Codes.” Clicking the Show Codes button lists the valid codes that you can choose to narrow your search.

You can use wild cards in your searches to get a range of items. (Wild cards include an asterisk [*] and the percent sign [%], which you can substitute for missing single characters.) (For example, if you search on the Call No. field with the search string “HD*”, Horizon returns a group of items with call numbers that start with HD.)

Horizon displays search results in the List Item Group Editor window.

You can start a new search or add more parameters to a current search at any time by choosing a different search option, such as Search or Where, from the File menu. (For more information, see “Using the List Search Window” in the “Getting Started” chapter of the *System Administration Guide*.) The Sort and Display functions let you arrange the items that your search finds. This can help you choose similar items for your group. (For instructions, see “List Windows” in the “Horizon User Interface” chapter of the *Horizon Basics Guide*.)

You cannot search in an existing group. Use the Sort and Display functions to organize the information in a group and then manually choose items to create a more specific group, or redo your search with additional parameters.

This section explains these topics:

- **Creating a New Item Group** on page 200
- **Using an Existing Item Group** on page 204

Creating a New Item Group

Item Group Editor lets you search for items to create a new group. Item Group Editor uses a compound search as its initial search screen, but you can also search using a simple search screen or a Where clause. (For instructions, see “Using the List Search

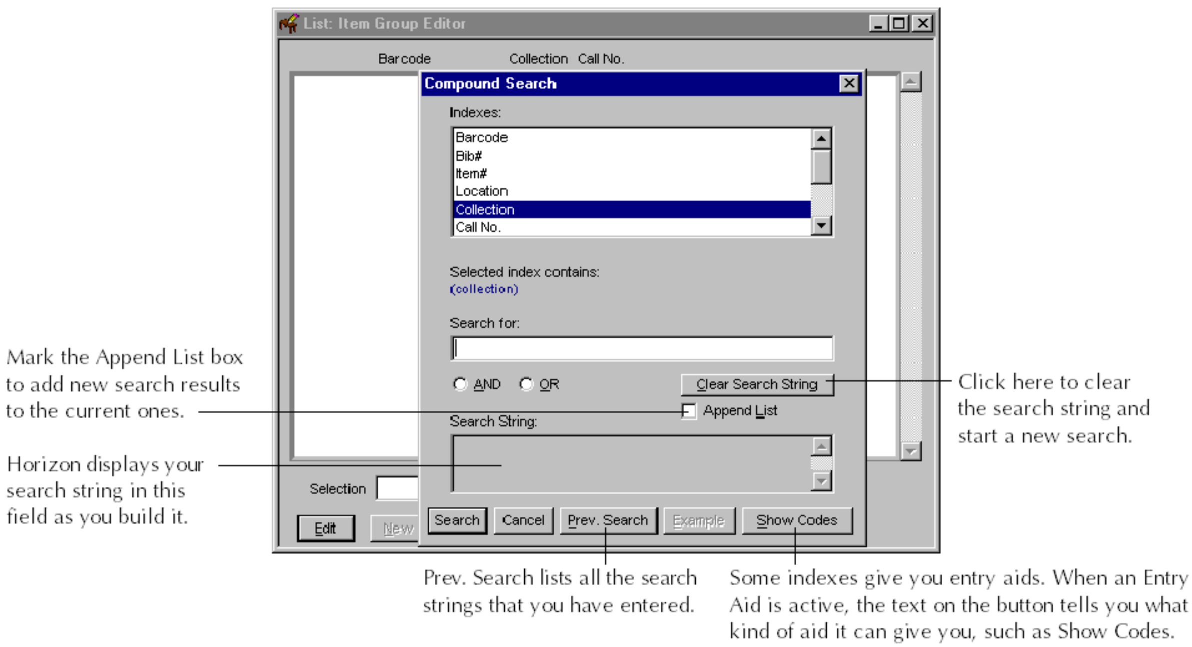
Window" in the "Getting Started" chapter of the *System Administration Guide*.) You can also handpick items from your search results to assure that your group contains only those items that you want it to contain. Your group can contain any items that exist in your library's database.

To create a new item group

1 Start the **Item Group Editor** process.

The default location of this process is the **Administration\Group Editor Menu** folder on the navigation bar.

Horizon opens the List Item Group Editor window and a Compound Search window:



Note: If you are already in Item Group Editor, you can choose one of the three search options from the File menu. However, if the List Item Group Editor window already contains data, Horizon replaces the data when you do a new search. Unless you want to add criteria to a previous search by marking the Append List box, make sure that you finish working with any existing data in the List Item Group Editor window before you start a new search.

2 Highlight the search index in which you want to search.

You can search for multiple items on these indexes:

- **Barcode**. Use wild cards to search for a range of items.
- **Bib#**. Use wild cards to search for a range of bib records.
- **Item#**. Use wild cards to search for a range of item numbers.
- **Location**. Click **Show Codes** for a list of valid location codes.
- **Collection**. Click **Show Codes** for a list of valid collection codes.

- **Call No**. Use wild cards to search for a range of call numbers.
- **Source**. Enter the code for the item supplier.
- **Price**. Use wild cards to search for a range of prices.
- **Notes**. Enter words or phrases from the bib record note field.
- **Itype**. Click **Show Codes** for a list of valid circulation types.
- **Item Status**. Click **Show Codes** for a list of valid statuses.

3 Enter the term or code for which you want to search in the **Search for** field.

4 If you want to add another search parameter, do one of these options:

- Mark the **AND** button (to limit your search).
- Mark the **OR** button (to expand your search).

5 Continue adding search parameters until you enter all the search parameters that you want.

6 Click **Search.**

Horizon opens the List Item Group Editor window and displays the items in your collection that match your search criteria.

Note: If Horizon does not find items in your collection matching your search criteria, a Search Message box opens telling you that nothing was found. Click **OK** to return to the Compound Search screen and enter new search criteria.

7 If you want to refine your search or start a new search, do one of these options:

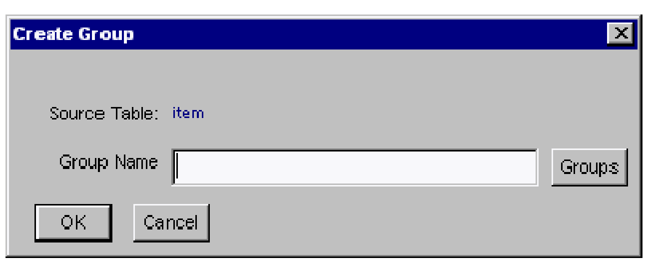
To use an SQL statement search	To do a Boolean search	To do a basic search
1. Choose **File, Where clause**. If you choose the Where clause when Horizon is displaying the results of your current search, the parameters for the first search display in the Where clause field. 2. If you want to, do one of these options: • To refine the search results, add to the parameters and click **Search**. • To use different parameters, delete the displayed parameters and start a new search. (For instructions, see "Using a Where Clause to Search for Rows" in the "Horizon Table Editor" section of the "Getting Started" chapter of the *System Administration Guide*.)	1. Choose **File, Compound Search**. This lets you perform Boolean searches using the AND and OR operators. If you choose the Compound Search when Horizon is displaying the results of your current search, Horizon displays the parameters from the first search in the Search String window. 2. If you want to, do one of these options: • To add to the previous search parameters, mark the **Append List** box. Then add to the parameters and click **Search**. • To use different parameters, click **Clear Search String** and start a new search. (For more information, see "Doing a Compound Search" in the "Horizon Table Editor" section of the "Getting Started" chapter of the *System Administration Guide*.)	1. Choose **File, Search**. 2. Highlight the index that you want to use. 3. Enter the search term that you want to use. 4. Click **OK**.

Note: When Item Group Editor is open, you can choose File and one of the search options at any time to perform new searches or to add to current searches. (For instructions, see "Using the List Search Window" in the "Horizon Table Editor" section of the "Getting Started" chapter of the *System Administration Guide*.)

8 Highlight the items in the List Item Group Editor window that you want to include in your new group. (To highlight the entire list, choose **Edit, Select All**.)

9 Choose **Group, Create Group**.

Horizon opens the Create Group dialog box:



If you have previously retrieved or created a group during this session, Horizon displays the name of that group in the Group Name field.

10 Enter a new name for the group in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.

11 Click **OK**.

Horizon returns to the List Item Group Editor window.

You can now choose, archive, or edit the items in the group.

Using an Existing Item Group

Item Group Editor saves the groups that you create. You can also create groups of items in the Table Editor using the item_report table. Item Group Editor lets you access these groups and archive or edit their data. You can sort and choose from the items in these groups to create additional groups of items.

A group created by someone else may have been created for a specific reason. Do not make any changes to a group or the items in it without checking with the person who created it. (For more information, see your system administrator.)

To use an existing item group

1 Do one of these options:

- If Item Group Editor is not open, do these steps:
  - Start the **Item Group Editor** process.

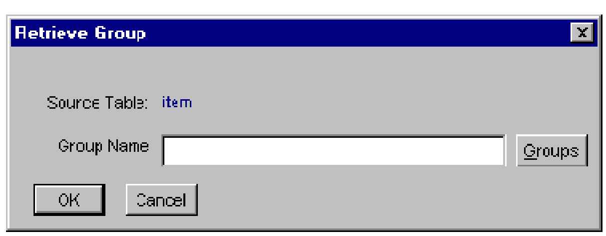
    The default location of this process is the **Administration\Group Editor Menu** folder on the navigation bar.

    Horizon opens the List Item Group Editor window and a Compound Search window.
  - Click **Cancel** twice.

    Horizon displays an empty List Item Group Editor window.
  - Choose **Group, Retrieve Group**.
- If you are already in Item Group Editor, choose **Group, Retrieve Group**.

Note: When you retrieve an existing group, Horizon replaces any existing data in the List Item Group Editor window. Make sure that you finish working with any existing data in the List Item Group Editor window before retrieving a group.

Horizon opens the Retrieve Group dialog box:



2 In the **Group Name** field, enter the name of the saved group that you want to use, or click **Groups** to choose from a list of existing groups.

3 Click **OK**.

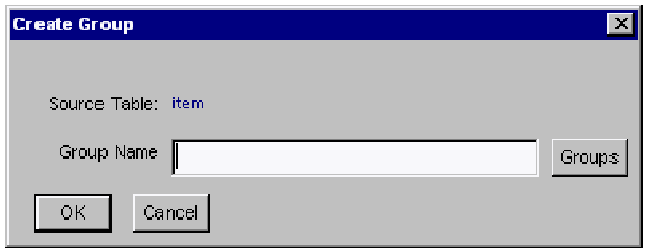
Horizon displays the group items in the List Item Group Editor window.

4 If you want to leave the original group unchanged, do these steps:

a Choose items from the group to create a new group. (To highlight the entire list, choose **Edit, Select All**.)

b Choose **Group, Create Group** to save the items you chose as a new group.

Horizon opens the Create Group dialog box:



If you have previously opened a group during this session, Horizon displays the name of that group in the Group Name field.

c Enter a new name in the **Group Name** field.

You can add a date as part of the name to help you keep your groups organized.

d Click **OK**.

Horizon saves a second copy of the group under the new name.

5 You can now choose, archive, or edit the items in the group.

Archiving Information about an Item Group

Once you have chosen items for your group, Item Group Editor lets you archive the information associated with the items before you make any changes. This keeps the original item information safe in a separate table. Then you can make changes to the information, and Horizon displays those changes in your library's database. To reverse the changes, you must restore the archived data. This brings the original information back into your database, replacing the changes you made. (For more information on restoring data, see **Restoring Information about an Item Group** on page 209.)

When you archive data, Item Group Editor creates a group that contains only the items you highlighted in the List Item Group Editor window when you archived the information. It also creates a table of archived data that is associated with this group. If you use an existing group name when you archive data, Horizon replaces both the previously archived data and the previously created group. When you name your group during archiving, make sure you do not choose the name of an existing group unless you are sure that you want to replace it.

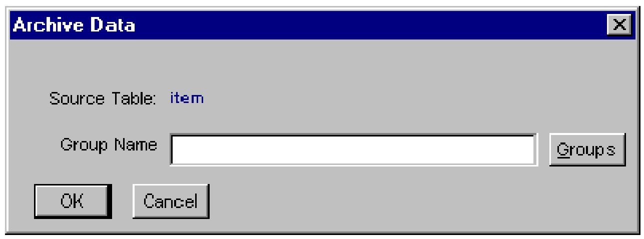
Your system administrator controls who has the rights to use this feature.

You archive information about a group by using a unique name. Make sure that you remember the name and the contents of the group so that you can work with it later. You can add a date as part of the name to help you keep your groups organized.

To archive information about an item group

1. Create a group. (For instructions, see **Creating an Item Group** on page 199**Creating an Item Group** on page 199.)
2. Click **Archive**.

   Horizon opens the Archive Data dialog box:

3. Enter a name in the **Group Name** field.

   You can add a date as part of the name to help you keep your groups organized.

4. If you want to replace old archived data with new archived data, click **Groups** to choose from a list of previously archived groups.

   Important: If you archive data using the same name as an existing group, you overwrite the original group. You also replace the original archived data with new data. Overwrite previously archived groups with caution.

5. Click **OK**.

   Horizon displays an Archive Confirmation dialog box reminding you that only the data from the selected records will be archived. If you use an existing group name, Horizon also tells you that the entire group and all its previously archived data will be replaced.

   Note: If you have not highlighted any rows, Horizon displays an Archive Confirmation dialog box that tells you that no records have been selected, that all members of the group will be archived, and that previously archived data will be replaced.

6. Click **OK**.

   Horizon archives your group's data and creates a group associated with it.

Editing Information about an Item Group

Item Group Editor lets you make permanent or temporary changes in your database by changing the information in a specific field for multiple items all at once. Once you choose the items for your group, you can make changes in the items' cataloging information. If the changes are temporary and you want to restore the original information at some later date, make sure that you archive the original information before making any changes. (For instructions, see **Archiving Information about an Item Group** on page 205.) When you edit item information in Item Group Editor, the new information becomes part of your current library database.

You can use Item Group Editor to edit information in these fields for a group of items:

- Item Type
- Location
- Collection
- Call Type
- Call No.
- Source
- Price
- Item Note
- Item Status
- Internal Note

If you archive an item status of "i" (Checked In) or "s" (Shelving Cart) and you change it to any other status, the restore command cannot return the status to "i" or "s".

Item Group Editor also lets you edit archived data. However, because archived data is information that you are holding to restore later, you should edit archived data only after careful thought and planning.

Here is an example of how you might edit archived data. If you want to set all Halloween materials to a shorter circulation period for the month of October, you can create a group named "Halloween" and archive its data. Then you can change the ITYPEs of the items in the group to reflect the shorter circulation period and change the call numbers to direct users to the display case. Later, you may decide that you want to include only Halloween videos in your Halloween group. You can restore the archived data for the original group, choose only the videos to create a new Halloween group, and rearchive the new Halloween group data, replacing the original archived data. You must change the ITYPE status and call number for the new Halloween group again and resave the change. The ITYPE changes that you made in the first group change have been restored and are no longer in effect. If you saved those changes in a separate group with no archived data associated with it, you should delete that group since it now contains saved data that is no longer archived—only the new Halloween group information is archived. If you do not restore the first Halloween group's archived data before you create the new Halloween group and rearchive the new group's data under the same name (Halloween), you lose the original call numbers and ITYPE of all the items in the original group except the videos.

Remember that archived groups contain original information that you want to restore at a later date. Use caution when editing archived groups.

To edit information about an item group

1 Do one of these options to display an item group in the List Item Group Editor window:

- If you have not already created a group, create one. (For instructions, see **Creating an Item Group** on page 199 **Creating an Item Group** on page 199.)
- If you have previously created an item group, or want to use an existing group, do these steps:
  - Choose **Group, Retrieve Group**.

    Horizon displays the Retrieve Group dialog box.
  - Click **Groups** to choose from a list of existing groups.
  - Double-click the group that you want to display.

2 If you are making temporary changes, make sure that you archive the group information. (For instructions, see **Archiving Information about an Item Group** on page 205.)

3 Highlight the items whose information you want to change. (To highlight all items in the group, choose **Edit, Select All**.)

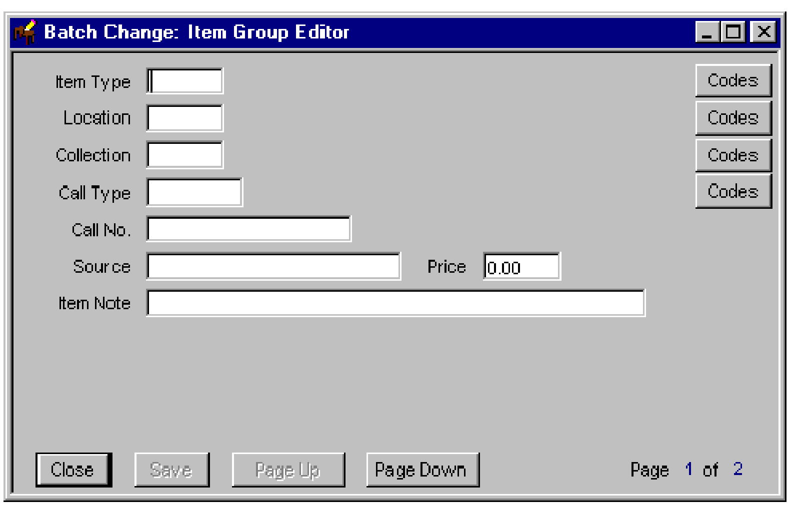
4 Click **Edit**.

Horizon asks if you want to make a batch change to all the selected records.

(If you have no items highlighted, Horizon displays the edit window for the item that the select arrow was pointing to when you clicked Edit.)

5 Click **OK**.

Horizon displays an Item Group Editor window:



The window title bar may read "Edit Item Group Editor" if you are changing only one record. All other fields are the same.

6 Enter any information that you want to change for all selected items in the group.

If you are not sure what information should go in a field, check with your system administrator.

7 Save your changes.

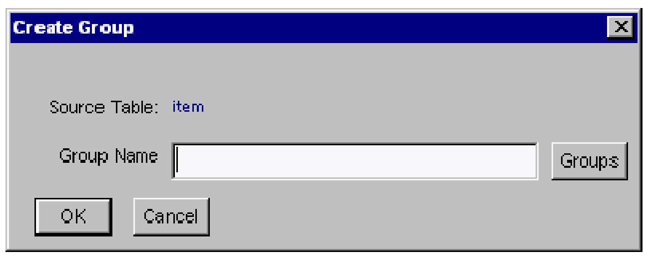
Horizon displays the List Item Group Editor window with the changes that you made.

8 If you plan to make other changes to the group at a later date (other than restoring the original data), do these steps:

a Reselect the items that you changed.

b Choose **Group, Create Group** to save the group with the first set of changes.

Horizon opens the Create Group dialog box:



If you have previously retrieved or saved a group during this session, Horizon displays the name of that group in the Group Name field.

c Do one of these options:

- Enter a new name for the group in the **Group Name** field.

  You can add a date as part of the name to help you keep your groups organized.

- Click **Groups** to choose from a list of existing groups.

Note: If you use an existing group name to save your new group, Horizon replaces the existing group. You cannot recover any original information contained in that group. However, if the existing group references archived material, Horizon does not let you overwrite it; instead, Horizon returns you to the Create Group dialog box so that you can choose a different name.

d Click **OK**.

Horizon returns to the List Item Group Editor window.

Restoring Information about an Item Group

Item Group Editor lets you restore item information from any data that you archive, as long as you have not overwritten the archived data by archiving another set of data with the same name. (If you overwrite or replace archived data, you lose the previously archived information.)

If you archive an item status of “i” (Checked In) or “s” (Shelving Cart) and you change it to any other status, the restore command cannot return the status to “i” or “s”.

You can choose to restore some item information while leaving other information as you changed it. Because Item Group Editor gives you so much flexibility, you may want to keep track of the item information that you archive and the changes that you make to the database. (For example, you could keep a list or a spreadsheet containing your changes and the names of the groups that contain them.)

When you restore archived data, you can choose whether to display a created group before you start restoring. If you display a created group before you restore data, you can choose which items and which archived information that you want to restore. If you do not display a created group before you restore data, you cannot choose which items that you want to restore, but you can choose which archived information that you want to restore.

To restore information about an item group

1. Start the **Item Group Editor** process.

   The default location of this process is the **Administration\Group Editor Menu** folder on the navigation bar.

   Horizon displays the List Item Group Editor window and a Compound Search window.

2. Click **Cancel** twice.

   Horizon displays an empty List Item Group Editor window.

3. Do one of these options:

   - If you do *not* want to display a saved group before you start restoring, continue with step 4.

   Note: If the List Item Group Editor window already contains data, you must display the saved group that you want to restore or close Item Group Editor and reopen it to get an empty List Item Group Editor window.

   - If you want to display a saved group before you start restoring, do these steps:
     - Choose **Group, Retrieve Group**.

       Horizon displays the Retrieve Group dialog box.

     - In the **Group Name** field, enter the name of the group for which you want to restore information, or click **Groups** to choose from a list of existing groups. (You must choose the name of a group with archived data associated with it.)
     - Click **OK**.

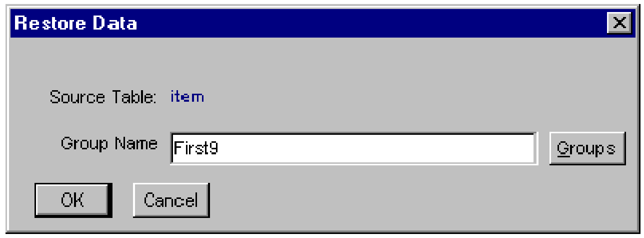
       Horizon displays the group in the List Item Group Editor window.

     - Do one of these options:
       - To restore information in selected rows, highlight the items for which you want to restore information.

- To restore information in all rows, do *not* highlight any items.

4 Click **Restore**.

Horizon displays the Restore Data dialog box:



If you have a group open, Horizon displays the name of that group in the Group Name field, as in this example.

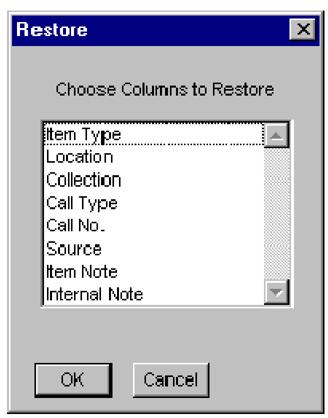
5 In the **Group Name** field, enter the name of the archived group that you want to restore, or click **Groups** to choose from a list of existing groups.

6 Click **OK**.

Depending on whether you highlighted items in the List Item Group Editor window, Horizon displays one of these messages:

7 Click **OK**.

Horizon displays the List Item Group Editor window with the group that you archived. It also displays a Restore dialog box:



8 Highlight the columns that contain the information that you want to restore.

9 Click **OK**.

Horizon displays the restored information in the List Item Group Editor window.

Clearing Archived Information about an Item Group

You can remove (or clear) archived data about an item group. You may want to clear archived data in these situations:

- You have archived groups that you no longer use.

- You have replaced one set of archived data with another set that you saved under a more descriptive name.
- You want to remove archived data about a group so you can use the group for something else.

Removing archived data is called clearing the archive.

Here is an example of how your library can use archive clearing. You may choose to archive data from a group of serials that you send to the bindery. Several of the serial subscriptions are discontinued and several others have been added, so the group is no longer valid. You can create a new group of the new serials and rearchive its information using a name that describes the new grouping. The old group, and the old archived data from that group, are now useless. You can clear the archive and delete the group.

When you archive data, Item Group Editor automatically creates a group that is associated with the archived data. Normally, this group functions in the background of the archive and restore functions, and you do not need to deal with it. However, if you clear an archive, the group still exists. Other users can access it. You may want to delete the Save Group if it is no longer necessary.

Make sure that no one else is using archived data or a group before you clear it or delete it. Once either one is gone, you cannot restore it.

If a group still references archived data, you cannot delete or overwrite it.

To clear archived information about an item group

1 Start the **Item Group Editor** process.

The default location of this process is the **Administration\Group Editor Menu** folder on the navigation bar.

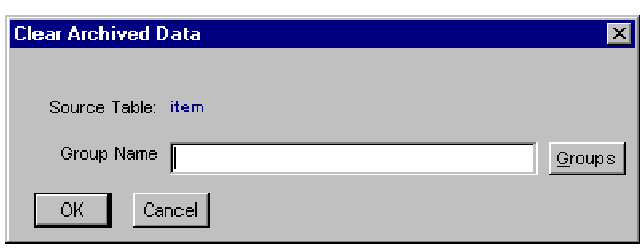
Horizon displays the List Item Group Editor window and a Compound Search window.

2 Click **Cancel** twice.

Horizon displays an empty List Item Group Editor window.

3 Choose **Group, Clear Archive.**

Horizon displays the Clear Archived Data dialog box:



4 Enter the name of the archived group that you want to clear, or click **Groups** to choose from a list of existing groups.

5 Click **OK**.

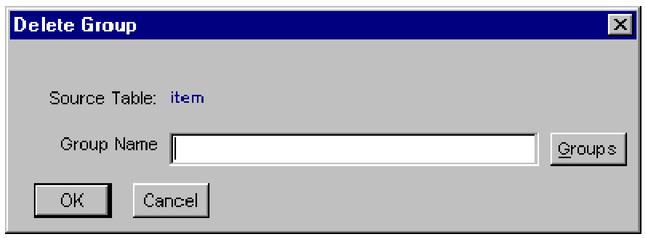
Horizon reminds you that the archived data associated with this group will be cleared.

6 Click **OK**.

Horizon returns to the List Item Group Editor window.

7 If you want to delete the group, choose **Group, Delete Group**.

Horizon displays the Delete Group dialog box:



8 Enter the name of the archived group that you just cleared, or click **Groups** to choose from a list of existing groups.

9 Click **OK**.

Horizon reminds you that the group will be deleted.

10 Click **OK**.

Horizon returns to the List Item Group Editor window.

Chapter 7: Workforms

This chapter explains how to create workforms—templates of MARC records. This chapter also explains other tasks dealing with workforms.

This chapter contains these sections:

About Workforms

A workform is a template that you use when you enter data to create a MARC record in Horizon's database. Workforms display the basic fields and subfields for the most used tags for each record type. When you create a new MARC record using an existing workform, those basic tags, fields, and subfields display automatically. You can add other tags as you create a new MARC record. You can also leave some fields and subfields blank if you do not need them. Horizon removes empty fields and subfields from the record when you save the record or use the MARC reformat function.

By setting up a workform ahead of time, you can more easily remember which data you most likely need to enter when you create a certain type of record. (For example, a map workform might include tags for the geographic area covered, while a video recording workform might include tags for performer notes and playing time.)

You can create a basic workform for each general type of record that you want to create. These might include books, sound recordings, maps, and authorities. Some workforms come with Cataloging when Horizon is installed. You can create new workforms, or edit existing ones to suit your library's needs. You can even create bibliographic (bib) workforms that have some data entered into certain subfields. This saves time and reduces typing errors if you need to catalog items that share a lot of the same data. (For example, if you are cataloging the Nancy Drew Mystery series, you could create a bib workform that includes the series name. It could also include the publication information if each of the books in the series that you are cataloging came from the same press.)

A workform has two ownerships. One specifies the owner of the workform and the other specifies the default ownership assigned to bib and authority records created from that workform. When you start to create an authority or bib record, Horizon displays a list of workforms to choose from. This list is filtered based on ownership, so you see only those workforms for which you have rights. If you need to use existing workforms that do not display in your list, see your system administrator to get rights for the appropriate ownership.

Understanding MARC and Non-MARC Workforms

You can create and edit workforms for MARC bib records, MARC authority records, non-MARC bib records, and non-MARC authority records. Non-MARC records can be either dynamic or static.

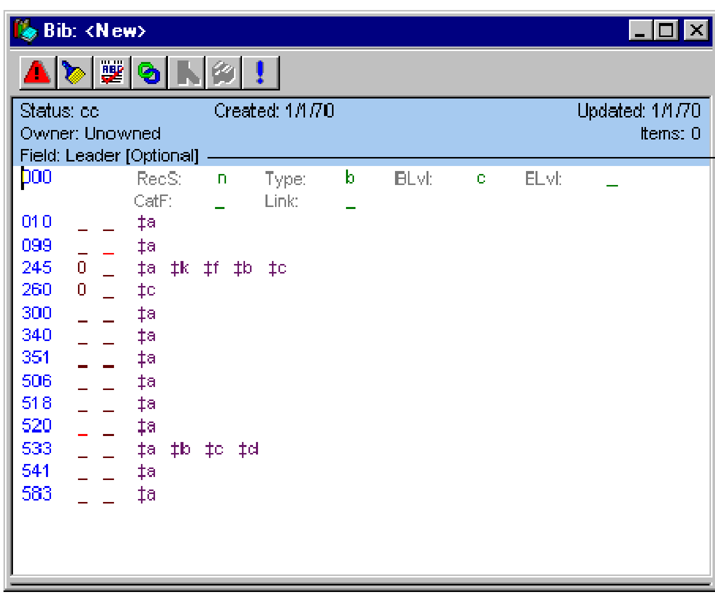
This section gives an overview of these types of workforms:

- **MARC Workforms** on page 215
- **Non-MARC Workforms** on page 216

MARC Workforms

MARC workforms include some tags and subfields. However, you are not limited to the fields and subfields on the workform. When you create a MARC record using the workform, you can add any other tags and subfields you need to create a complete record.

Here is an example of a MARC bib workform:



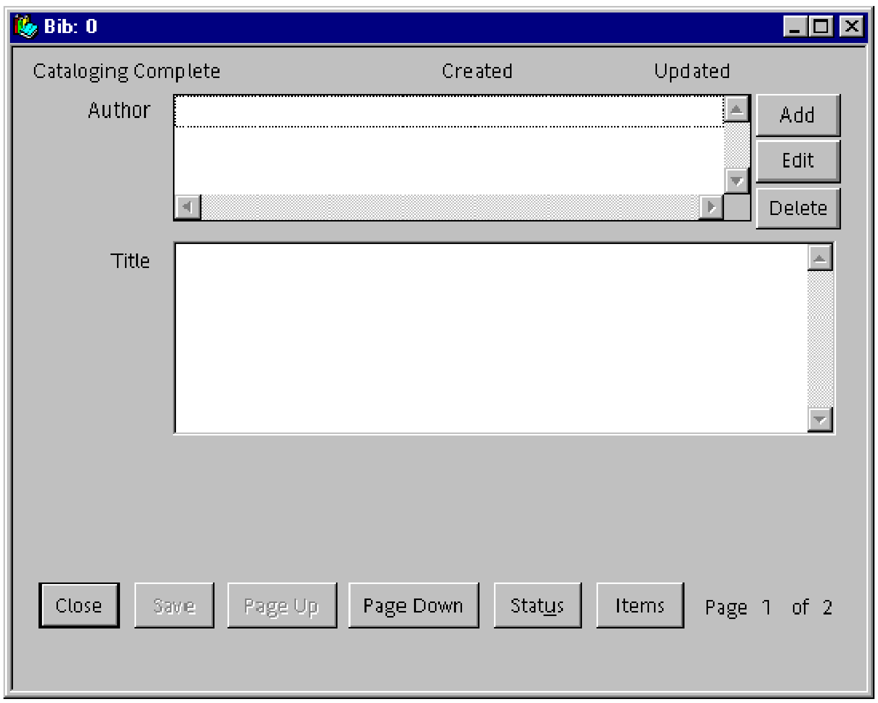
The MARC Editor displays the type of content in the tag, indicator, or subfield where you place the insertion pointer.

All MARC records, including workforms, tell you what each tag, indicator, or subfield area should contain when you click on the number or letter identifying the tag area or within a subfield. This information displays in the header. (For more information on MARC records, see the **MARC Editing** chapter.) You can also set up your MARC Editor to display labels for tags, indicators, and subfields. (For instructions, see **Changing the Default View** on page 14.)

Non-MARC Workforms

Non-MARC workforms display as windows with fields in which you enter information. These fields are in non-MARC format. This means that Horizon displays them without the tag, field, and subfield identifying letters and numbers. If you use a static non-MARC workform, you cannot add or delete any fields in the workform. You can add and delete fields in dynamic non-MARC workforms. (For more information, see **Creating a Non-MARC Workform** on page 221.)

Here is an example of a non-MARC bib workform:



Non-MARC authority workforms must exist before you can use non-MARC bib workforms to create new bib records. (For more information, see See "Creating a Non-MARC Workform"**Creating a Non-MARC Workform** on page 221.)

Creating a Workform

You can create MARC and non-MARC workforms from scratch or by copying existing workforms.

This section explains these topics:

- **Creating a MARC Workform** on page 217
- **Creating a Non-MARC Workform** on page 221
- **Copying a Workform** on page 225

Creating a MARC Workform

You can create your own MARC workforms. You can also copy or modify existing workforms to suit your library's needs. (For example, you can create a different workform for a video or a map than you would use for a book.)

There are two kinds of MARC workforms that you can create: bib workforms and authority workforms. There are other ways to create MARC records. (For more information, see **Creating a New Bib Record** on page 82 and **Creating an Authority Record** on page 116.)

This section explains these topics:

- **Creating a MARC Bib Workform** on page 217
- **Creating a MARC Authority Workform** on page 219

Creating a MARC Bib Workform

MARC bib workforms are the templates that you use to create the bib records that represent individual titles you may have in your library. A MARC bib workform should include all tags, including fields and subfields, that a bib record for a certain type of item would usually contain.

For example, a MARC bib workform for a book might include tags for a title statement, a publication and distribution statement, and a physical description. However, it might not include a statement of responsibility subfield in a title statement tag because that subfield could be filled in several different ways, such as with a personal name or a corporate name.

When you use a bib workform, you are not limited to the fields and subfields on the workform. You can add other tags and subfields that are necessary to create a complete record.

To create a MARC bib workform

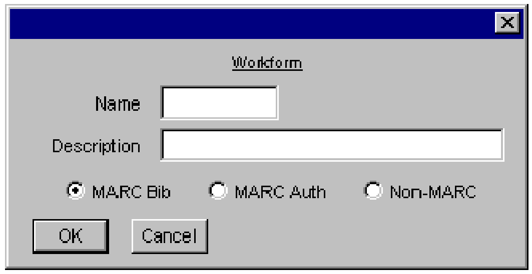
1 Start the **Workforms** process.

The default location of this process is the **Cataloging** folder on the navigation bar.

Horizon displays the List Workforms window.

2 Click **New**.

Horizon opens this dialog box:



3 Enter information in these fields:

Field	Action
Name	Enter a name for your workform. (You can enter up to seven characters.)
Description	Enter a description of the workform.
MARC Bib	Leave this button marked.

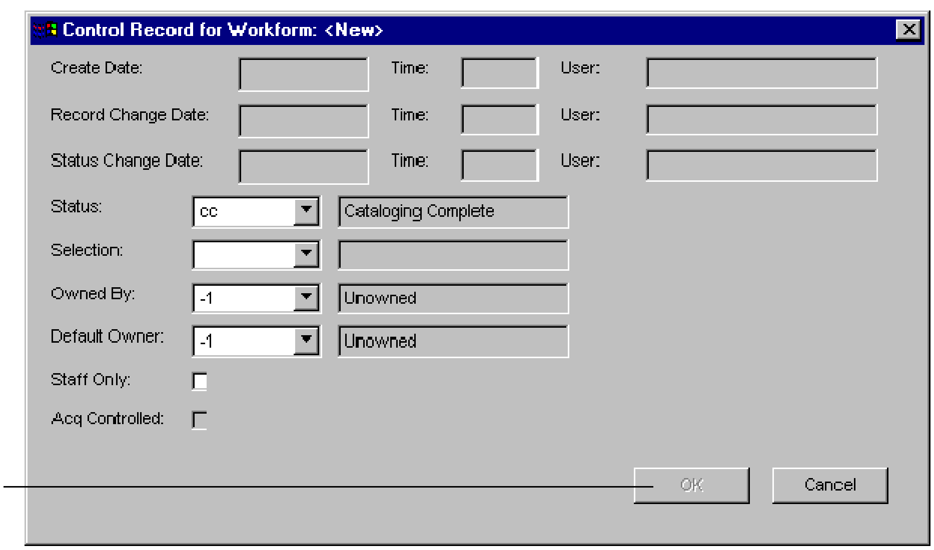
4 Click **OK.**

Horizon closes the dialog box and displays the new workform.

5 Add the tags and subfields that you want your workform to contain. (For instructions, see **Adding a Component to a MARC Record** on page 48.)

6 Choose **Marc, Show Control Record**, or click the **Record Status** icon (!).

Horizon opens the Control Record for Workform window:



The OK button remains inactive until you change something in the control record.

7 Enter a status in the **Status** field, or click on the drop-down menu to choose from a list of valid status codes. (For information on record statuses, see **Changing a Bib or Authority Record's Status** on page 231.)

8 If you want to, enter a selection list code in the **Selection** field that will apply to all the items created from this workform, or click on the drop-down menu to choose from a list of valid codes.

9 If you want to change ownerships, do one or both of these options:

- In the **Owned By** field, use the drop-down list to change the code to the owner that you want for this workform.
- In the **Default Owner** field, use the drop-down list to change the owner that you want to assign to any records created using this workform.

10 If you want only staff members to be able to view records created from this workform, mark the **Staff Only** box. (For more information on specifying records for staff only, see **Specifying a Record for Staff Use Only** on page 232.)

11 Click **OK**.

Horizon closes the Control Record for Workform window and returns to the MARC workform.

12 Save your changes.

Creating a MARC Authority Workform

MARC authority workforms are templates that you can use to create authority records. You can also create authority records in other ways, such as by adding a tag to a bib record. An authority record that Horizon creates for you automatically does not need a workform, but to create an authority record manually, you must use a workform. (For more information on creating an authority record, see **Creating an Authority Record** on page 116.)

A MARC authority workform should include all tags and subfields that an authority record of a certain type would usually contain. (For example, a subject MARC authority workform might include only a tag for a subject with all possible subfields because Horizon removes empty subfields when you save or reformat a MARC record.)

When you use an authority workform, you are not limited to the fields and subfields in the workform. You can add other tags and subfields that are necessary to create a complete record.

To create a MARC authority workform

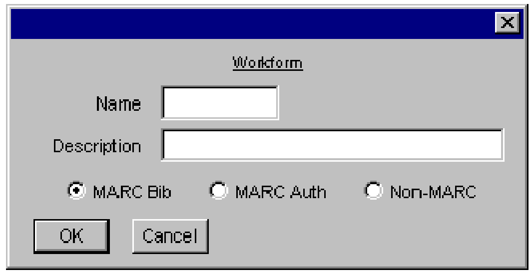
1 Start the **Workforms** process.

The default location of this process is the **Cataloging** folder on the navigation bar.

Horizon displays the List Workforms window.

2 Click **New**.

Horizon opens this dialog box:



3 Enter information in these fields:

Field	Action
Name	Enter a name for your workform. (You can enter up to seven characters.)
Description	Enter a description of the workform.
MARC Auth	Mark this button.

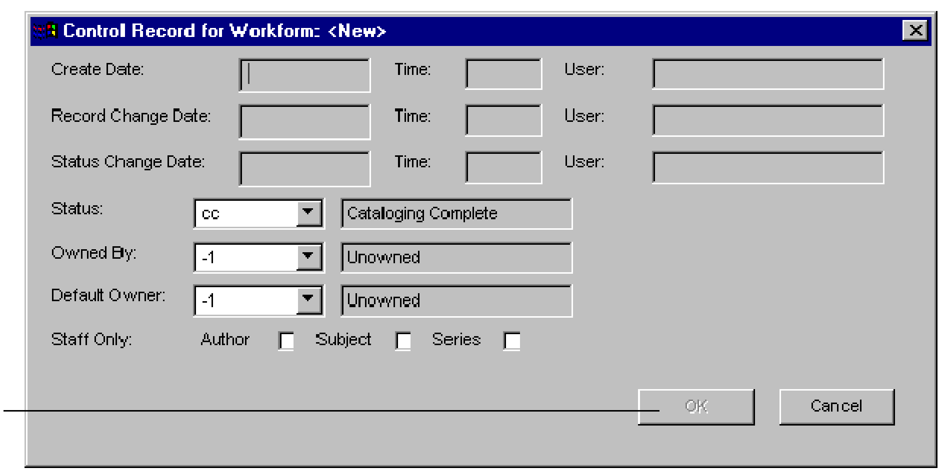
4 Click **OK.**

Horizon closes the dialog box and displays the new workform.

5 Add the tags and subfields that you want your workform to contain. (For instructions, see **Adding a Component to a MARC Record** on page 48.)

6 Choose **Marc, Show Control Record**, or click the **Record Status** icon (!).

Horizon displays the Control Record for Workform window:



The OK button remains inactive until you change something in the control record.

7 Enter a status in the **Status** field, or click on the drop-down menu to choose from a list of valid status codes. (For information on record statuses, see **Changing a Bib or Authority Record's Status** on page 231.)

8 If you want to change ownerships, do one or both of these options:

- In the **Owned By** field, use the drop-down list to change the code to the owner that you want for this workform.
- In the **Default Owner** field, use the drop-down list to change the owner that you want to assign to any records created using this workform.

9 If you want only staff members to be able to view author, subject, or series records created with this workform, mark the appropriate boxes in the **Staff Only** field. (For more information on specifying records for staff only, see **Specifying a Record for Staff Use Only** on page 232.)

10 Click **OK**.

Horizon closes the Control Record for Workform window and returns to the MARC workform.

11 Save your changes.

Creating a Non-MARC Workform

You can work in two types of non-MARC workforms: static and dynamic. Within each type are two kinds of non-MARC workforms: authority and bib. This means that you can create four different non-MARC workforms: static authority workforms, static bib workforms, dynamic authority workforms, and dynamic bib workforms. Although static and dynamic workforms look similar, they “behave” differently.

Workform type	Description
Static non-MARC workforms for bib and authority records	These have predefined fields. You cannot add fields to these workforms when you are creating a record from them. Consequently, all necessary cataloging fields should already be included on the workform.
Dynamic non-MARC workforms for bib and authority records	These also have predefined fields. However, you can add fields to these workforms when you are creating a record from them. Consequently, this workform may contain a minimum number of fields.

MARC bib records can link only to MARC authority records. Non-MARC static bib records can link only to non-MARC static authority records, and non-MARC dynamic bib records can link only to non-MARC dynamic authority records. Horizon ships with one example of a static non-MARC author authority workform and one example of a static non-MARC bib workform. Before you can create non-MARC bib records, you must create all the other non-MARC workforms that you want to use. If you do not, you cannot create non-MARC bib records because you do not have the tools (the non-MARC workforms) to create the non-MARC authority records to which they link. When you create non-MARC workforms, you should give them names and labels that remind you that they are non-MARC and whether they are static or dynamic.

Your system administrator must set up several views before you can create non-MARC workforms. (For more information, see “Setting Up Non-MARC Parameters” in the *Cataloging Setup Guide*.)

To create a non-MARC workform

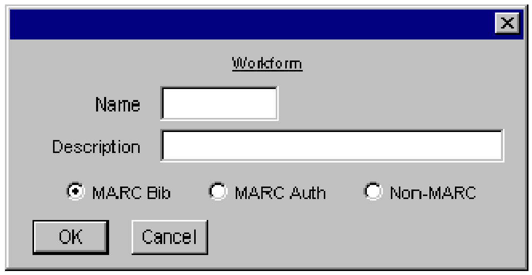
1 Start the **Workforms** process.

The default location of this process is the **Cataloging** folder on the navigation bar.

Horizon displays the List Workforms window.

2 Click **New**.

Horizon opens this dialog box:



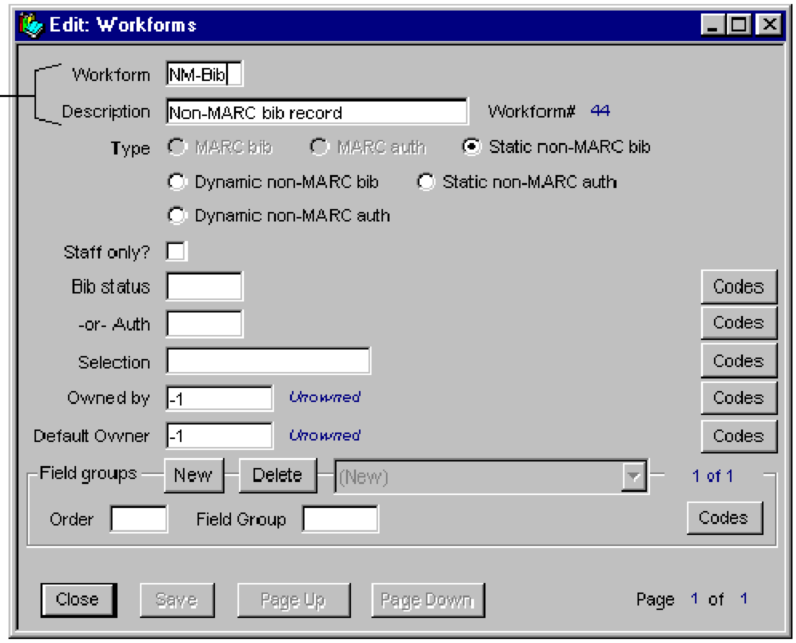
3 Enter information in these fields:

Field	Action
Name	Enter a name for your workform. (You can enter up to seven characters.)
Description	Enter a description of the workform.
Non-MARC	Mark this button.

4 Click **OK**.

Horizon closes the dialog box and displays the Edit Workforms window:

The name and description you entered in the workform display in the Workform and Description fields.



5 Complete these fields on the window:

Field	Action
Type	Mark one of these buttons to choose the type of workform that you want to create: • Static non-MARC bib • Dynamic non-MARC bib • Static non-MARC auth • Dynamic non-MARC auth **Note:** Workforms for static and dynamic authorities must exist before you can add new authorities to static and dynamic bibs. Make sure that you create workforms for the static and dynamic authorities before you create bib record workforms.
Staff only?	If you want only staff members to be able to view records created with this workform, mark this box. (For more information, see **Specifying a Record for Staff Use Only** on page 232.)
Bib status -or- Auth status	Enter either a bib or authority status, or click **Codes** for a list of valid choices. (For more information, see **Changing a Bib or Authority Record's Status** on page 231.)

Field	Action
Selection	If you want to, you can enter a selection list code that will apply to all the items created from this workform, or click **Codes** for a list of valid choices. (For more information, see **Using a Selection List** on page 88.)
Owned by	Enter the name of the owner for the workform. If you do not enter a name, Horizon uses the default specified in your Login Options. (For more information on Login Options, see the "Logging In to Horizon" section in the "Getting Started" chapter of the *Horizon Basics Guide*.)
Default Owner	Enter the name of the default owner for records created with this workform. If you do not enter a name, Horizon uses the default specified in your Login Options. (For more information on Login Options, see the "Logging In to Horizon" section in the "Getting Started" chapter of the *Horizon Basics Guide*.)
Order	Assign an order number for the field that you will add. (For example, a "1" in the Order field designates that field as the first field to display on the workform.) **Note:** SirsiDynix recommends that you use nonsequential order numbers (such as 10, 20, 30, and so forth). This lets you add new fields later without having to renumber the existing fields.
Field Group	1. Enter the field that you want to add, or click **Codes** for a list of valid choices. **Note:** Your system administrator must set up Non-MARC field groups in a view before you can use them. (For more information, see "Setting Up Non-MARC Parameters" in the *Cataloging Setup Guide*.) 2. Click **New** on the **Field groups** group. Horizon clears the Order and Field Group fields, puts "(New)" in the list field, and, in the upper-right corner of the group, displays the number of fields in the list including the new field that Horizon is ready to create. 3. Repeat these Field Group steps until you have added all the fields that you want to include on your workform.

6 Save your changes.

Copying a Workform

You can create a new workform by copying an existing one and editing the fields.

To copy a workform

1 Start the **Workforms** process.

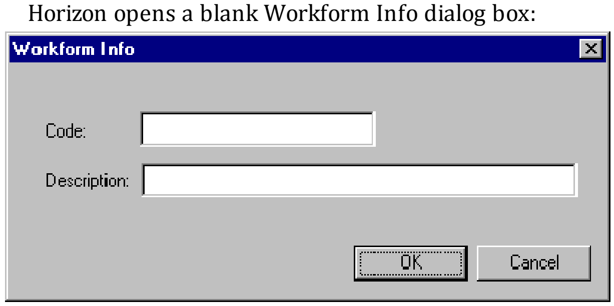
The default location of this process is the **Cataloging** folder on the navigation bar.

Horizon displays the List Workforms window.

2 Highlight the workform that you want to copy.

3 Choose **File, Copy Record**.

4 Do one of these options:

If you copied a MARC workform	If you copied a non-MARC workform
Horizon opens a new workform with the information from the original workform. Do these steps: 1. Choose **Marc, Edit Workform Info**. Horizon opens a blank Workform Info dialog box:  2. Enter a name for the new workform in the **Code** field. 3. Enter a description in the **Description** field. 4. Click **OK**. Horizon closes the dialog box and returns to the workform. 5. Do any of these options, as needed: • Edit any tags and subfields that you want to change. • Add any tags and subfields that you want to add. • Delete any tags or subfields that you want to remove. (For instructions, see **Editing a MARC Record** on page 63.) 6. Save your changes.	Horizon opens an Edit Workforms window. Do these steps: 1. Edit the workform window to create the workform you want. (For a description of the fields, see **Creating a Non-MARC Workform** on page 221.) 2. Save your changes.

Horizon closes the dialog box and returns to the List Workforms window.

Finding and Opening a Workform

You can find and open any existing workform to see the settings and edit the workform.

To *use* an already existing bib or authority workform to create a new record, you start the Create New Bib or Create New Auth processes. (For instructions, see **Creating a New Bib Record** on page 82 or **Creating an Authority Record** on page 116.)

To find and open a workform

1 Start the **Workforms** process.

The default location of this process is the **Cataloging** folder on the navigation bar.

Horizon opens the List Workforms window.

2 Highlight the workform that you want to open.

3 Click **Edit**.

Horizon does one of these things:

- If you chose a MARC workform, Horizon opens the workform.

  (For a description of each field, click on the tag number, indicator, or subfield letter. Horizon displays the description in the bottom line of the header.)

- If you chose a non-MARC workform, Horizon opens an Edit Workforms window.

  (For a description of each field, see **Creating a Non-MARC Workform** on page 221.)

Editing a Workform

You can edit both MARC and non-MARC workforms to change the default template for a record.

To edit a workform

1 Open the workform that you want to edit. (For instructions, see **Finding and Opening a Workform** on page 226.)

2 Edit the tags and subfields.

Editing changes can include:

- Adding a tag or subfield
- Deleting a tag or subfield
- Editing fixed field positions to contain default values
- Editing default text in variable fields

(For instructions, see **Editing a MARC Record** on page 63.)

3 Save your changes.

Renaming a Workform

You can change the code and description of a workform to make it more meaningful. You can change both MARC and non-MARC information.

This section explains these topics:

- **Renaming a MARC Workform** on page 227
- **Renaming a Non-MARC Workform** on page 227

Renaming a MARC Workform

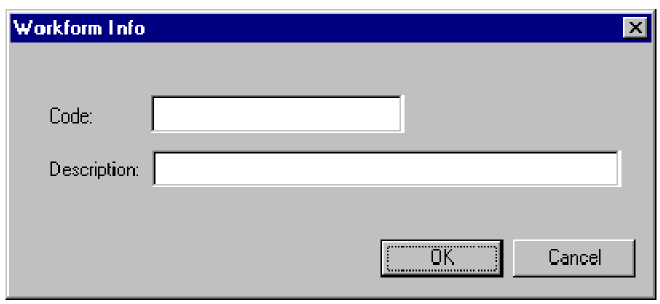
You rename a MARC workform in a secondary window.

To rename a MARC workform

1 Open the workform that you want to rename. (For instructions, see **Finding and Opening a Workform** on page 226.)

2 Choose **Marc, Edit Workform Info**.

Horizon opens a Workform Info dialog box:



3 In the **Code** field, enter a new code for the workform.

4 In the **Description** field, enter a new description for the workform.

5 Click **OK**.

Horizon closes the dialog box and returns to the workform.

6 Save your changes.

Renaming a Non-MARC Workform

You rename a non-MARC workform by changing information in the workform fields.

To rename a non-MARC workform

1 Open the workform that you want to rename. (For instructions, see **Finding and Opening a Workform** on page 226.)

Horizon opens the Edit Workforms dialog box.

2 In the **Workform** field, enter a new code for the workform.

3 In the **Description** field, enter a new description for the workform.

4 Save your changes.

Deleting a Workform

You can delete an existing workform if your library no longer uses it.

To delete a workform

1 Start the **Workforms** process.

The default location of this process is the **Cataloging** folder on the navigation bar.

Horizon opens the List Workforms window.

2 Highlight the workform that you want to delete.

3 Choose **File, Delete Record**.

Horizon prompts you to verify the action.

4 Click **OK**.

Horizon deletes the workform.

Chapter 8: Control Records

This chapter explains how to open control records and edit information in them.

This chapter contains these sections:

About Control Records

When you create or edit a MARC record or workform, Horizon collects information about that record or workform in a separate record called a control record. A control record can include this information:

- **Create Date, Time, and User**. This specifies when and by whom the record was created.
- **Record Change Date, Time, and User**. This specifies when and by whom the record was changed.
- **Status Change Date, Time, and User**. This specifies the last time the status of the record was changed.
- **Status**. This specifies the current cataloging status of the record.
- **Selection** (optional). This identifies the source of the purchase recommendation.
- **Owned By** (optional). This identifies who owns the record. (Ownership lets only a staff member who belongs to the specified group change the record.) The code that you use indicates a person or group. If you do not enter a code, Horizon uses the ownership specified during login.
- **Default Owner** (workform only). This identifies who has rights to change records created using a specific workform. The code that you use can indicate a person or a group.
- **Staff Only**. This specifies whether only staff can view the record, but only if your library has set up public-only indexes.
- **Acq controlled**. This shows when a record was created in Acquisitions.

You cannot create or delete control records. However, you can edit this control information:

- Status
- Selection
- Owned By
- Default Owner

- Staff Only

You can set a default for the Status and Staff Only fields for control records in workforms. If no default status is set in the workform, Horizon uses the default set in the bib_status or auth_status table. (For more information, see “Setting Up Bib and Authority Record Statuses” in the *Cataloging Setup Guide*.)

Opening a Control Record

You open a control record through its MARC record or workform.

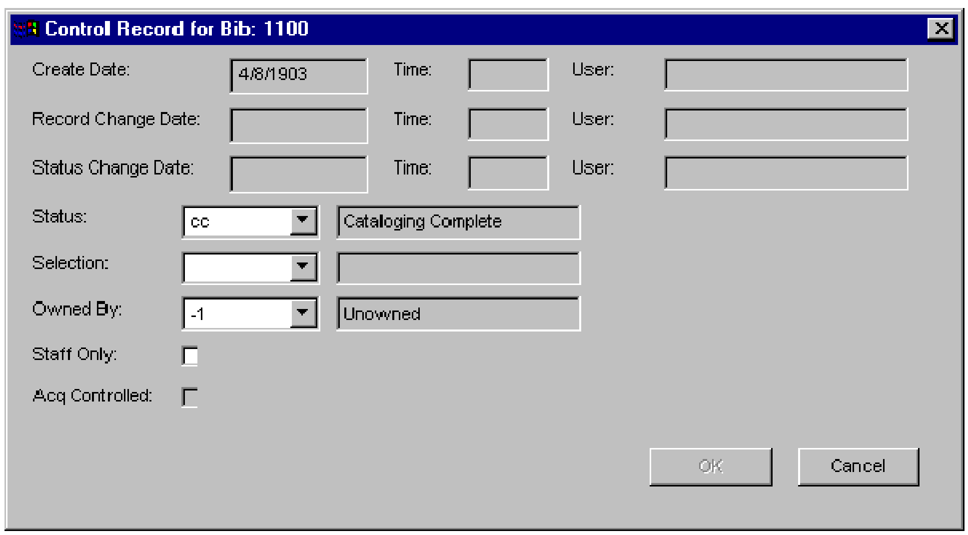
To open a control record

1 Open the MARC record for which you want to view control information.

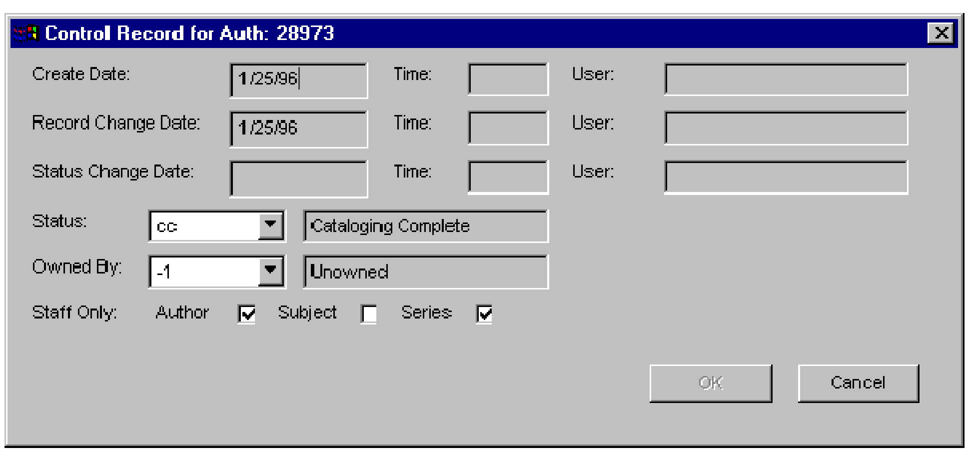
2 Choose **Marc, Show Control Record**, or click the **Record Status** icon (!).

Horizon opens one of these windows, depending on whether you are in a bib or authority record:

Record status information for a bib record



Record status information for an authority record



Note: Some of these fields may not display information on your Edit Status Information window, depending on whether they are valid for that record. (For example, if a record was created by someone outside your Horizon system, no creation operator displays.)

Adding or Editing Information in a Control Record

Horizon automatically adds and edits information in some fields as you work with MARC records associated with the control records. You can manually edit some information in a control record.

This section explains these topics:

Changing a Bib or Authority Record's Status

Bib and authority records have different status fields. Horizon provides default statuses that you can assign to each record. A bib record may have one of these statuses:

- cc (Cataloging Complete)
- ip (In Process)
- ns (No Status)
- uc (Uncataloged)
- uf (User Fast Added)
- wd (Withdrawn)

An authority record may have one of these statuses:

- cc (Cataloging Complete)
- ns (No Status)

"Cataloging Complete" is the default status set for both bib and authority records. You can change this default or add to and edit the preset status fields in the Table Editor. (For information, see "Setting Up Bib and Authority Record Statuses" in the *Cataloging Setup Guide*.)

Because the default status is set to "Cataloging Complete," you should change the status for fast-added records to reflect their uncataloged status.

To change a bib or authority record's status

1 Open the control record of the bib or authority record for which you want to change the status. (For instructions, see **Opening a Control Record** on page 230.)

2 Enter the new status in the **Status** entry box. Use the drop-down menu for a list of valid options.

3 Click **OK**.

Horizon closes the control record and returns to the MARC record.

4 Save your changes.

Adding an Item to a Selection List

You can use a selection list to track items that you want to review or are thinking of buying. You create a selection list by assigning a title's MARC bib record to the selection list you want. You do this by choosing the selection list you want on the control record. Horizon must be set up to use this feature. (For more information, see **Using a Selection List** on page 88.)

Designating Record Ownership for MARC Records

Many libraries, especially library consortia, multibranch libraries, and those who use union catalogs, need to manage access rights to data. Record ownership lets libraries define who can access particular information in their database. Libraries set their own policies on how to use record ownership designation.

You can designate an owner for each MARC record in your database. (For more information, see "Securing Horizon" in the "Security and Preferences" chapter of the *System Administration Guide*.)

If records imported into Horizon contain owner identification, Horizon retains this information.

To designate record ownership for MARC records

1 Open the control record of the bib or authority record for which you want to change the status. (For instructions, see **Opening a Control Record** on page 230.)

2 Enter an owner in the **Owned by** field. Use the drop-down menu for a list of valid owners.

3 Click **OK**.

Horizon closes the control record and returns to the MARC record.

Horizon returns to the List Workforms window.

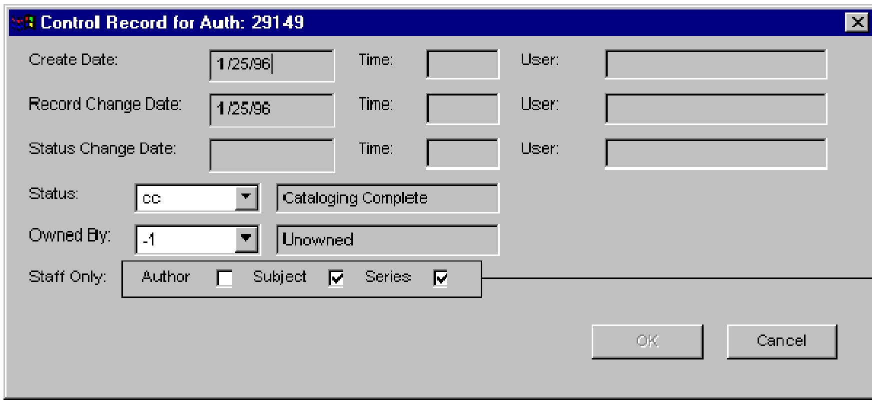
4 Save your changes.

Specifying a Record for Staff Use Only

Horizon lets you specify records that you do not want the public to view when they search your database. You can choose who views a record by marking or unmarking the Staff Only box in the control record. Horizon indexes records according to these settings. This means that a record flagged as Staff Only displays on staff workstations, but not in a public search.

Your system administrator must set up public-only indexes and create staff-only settings in Horizon indexes in order for this feature to work. Your system administrator should Contact Customer Support before doing these tasks. (There may be an additional charge for setting up public-only indexes.)

Authority control records have three Staff Only boxes—one for each type of authority:



Authority Staff Only boxes

You can specify an authority record that is valid as more than one type of authority to display as one type to library staff only and as a different type to the public, depending on how you mark the boxes. Horizon automatically marks the Staff Only boxes in authority control records if any of these conditions exist:

- The authority record is not valid for that type of authority. (For example, if the authority record is valid only as an author authority, Horizon automatically marks the Subject and Series Staff Only boxes.)
- No bib records are attached to that authority record as that type of authority.
- All bib records attached to the authority record are flagged as Staff Only.

You can override these settings by marking or unmarking the appropriate Staff Only button in that authority record.

To specify a record for staff use only

1 Open the control record of the bib or authority record for which you want to change the status. (For instructions, see **Opening a Control Record** on page 230.)

2 Do one of these options:

- For bib records, mark the **Staff Only** box.
- For authority records, mark the boxes that describe the type of the authority record that you want only library staff to view.

3 Click **OK**.

Horizon closes the control record and returns to the MARC record.

4 Save your changes.

Chapter 9: Importing and Exporting Records

This chapter explains how to import and export records using both Horizon criteria and SQL statements. It includes information on import errors and how to resolve them.

This chapter contains these sections:

About Importing and Exporting Records

You can transfer records from a disk or network drive into your Horizon system. This lets you bring new records into your database. You can also transfer records from your Horizon system to a disk or network drive. This lets you work outside of your library system on records that need modification. Then you can import them when you finish modifying them. You can also transfer existing records between databases and servers within your Horizon system.

Importing Records

You can import records into your library's catalog instead of creating your own new records. You might import records when you buy records to put into your database. You can also import records that you export from other Horizon databases. If you import linked bibliographic (bib) records using multiple workstations, each workstation must have a unique Horizon user ID in order to handle the linked bibs properly. (For more information, see **Working with Linked Bib Records** on page 99.)

If you import brief bib records that contain embedded item information, your system administrator can set your import source parameters so that Horizon knows whether to create new item records for just new bibs or for both new or matched bibs. This lets you import embedded item information without overlaying an existing bib record.

When you import records, you specify these things:

- **The import file**. This is the computer file containing the data that you want to import.

- **The import source**. This is the profile that determines how Horizon handles records during the import process.
- **Overlay options**. These are the parameters you specify for replacing records in your database with those you are importing.
- **Status** (optional). The status options let you specify the status of the new and overlaid records.
- **Staff Only** (optional). This can specify whether the new records are flagged as staff only.
- **Selection** (optional). This can identify the selection list of the purchase recommendation.
- **Owner** (optional). This specifies who can change the record once it is imported. If you do not specify an owner, Horizon assigns the default owner from the import source.
- **Import schedule** (optional). This can tell Horizon the date and time that you want to begin importing.

If you have several dozen MARC indexes on your system, you may want to set up Horizon to defer some of the indexing tasks when you import MARC records. This can help speed up the indexing process. (For instructions, see “Understanding Deferred Indexing” in the *Cataloging Setup Guide*.)

This section explains these topics:

- **Understanding Import Sources** on page 236
- **Overlay Options** on page 238
- **Importing Bib and Authority Records** on page 240
- **Importing Embedded Item Information without Overlaying Existing Bib Records** on page 247

Understanding Import Sources

Import source profiles determine how Horizon handles records during the import process. (For more information, see “Setting Up Import Source Parameters” in the *Cataloging Setup Guide*.) Your system administrator should have already set up import source profiles for your library.

Check with your system administrator before you edit or create import source profiles.

You must specify an import source each time you import records. Import source profiles determine these things:

- **Status**. Specifies the status assigned to imported MARC records. (You can override this profile status from the Multi-Format Import window when you start an import.)
- **Staff Only Index**. Indicates whether the imported MARC records are flagged as Staff Only. (You can override this profile setting by marking or unmarking New

Bib Staff Only or New Auth Staff Only in the Multi-Format Import window when you start an import.)

- **Prefix Processing**. Changes the prefix assigned to the record from the original source to match the prefix of the library cataloging system.
- **Match Points**. Determines the tags or Cataloging indexes compared between incoming and existing records to determine any matches (duplicates) for the purpose of overlay.
- **Tag Preservation**. Specifies the fields, if any, preserved in an existing record when it gets overlaid by incoming records. (You specify at the time of import whether records are overlaid or not.)
- **Tag Action**. Depending on the settings in the import source, this translates the data in a tag or subfield, renames a tag or subfield, or deletes a tag or subfield.
- **Item Creation**. Determines whether item records are created from incoming bib records and, if so, what tags and subfields to check for item data such as location, item type, and collection. Your system administrator defines one or more profiles that determine where item information is stored in the incoming bib record and where that information is put in the new item record.
- **Default Owner**. Determines the owner for the records you are importing. (You can override this profile status from the Multi-Format Import window when you start an import.)
- **Auth Link Type**. Determines the authority link type for any authority records you import.

Based on the import source profile, Horizon checks for these things during import:

- **New records**. Records that are different from existing records in your database. Horizon establishes the differences by using the match points specified in the import source profile. When an incoming record does not match the data in the match point fields of an existing record, Horizon recognizes it as a new record.

  Matches. Records that match existing records in your database. Horizon determines matches by using the match points established in the import source profile. Match points might include Horizon indexes, such as ISBN, or tags that contain record numbers. When an incoming record matches the data in the match point field of an existing record, Horizon recognizes it as a match.

If there are multiple tags for the matching index on the incoming record, only the first tag will be used for matching. You can match on more than one tag by customizing the Cataloging Import launcher to add the "/V" argument. (For example, you can choose to match on the second ISBN.) For more information, see "Setting Up Multiple Tag Matching" in the *Cataloging Setup Guide*.

Horizon treats all matches on MARC records the same, depending on which overlay options you choose, except for system-generated authorities. Incoming records always overlay system-generated authorities. (For more information, see **Overlay Options** on page 238.)

Overlay Options

Horizon lets you specify whether you want to overlay (replace) MARC records in your database with the ones you are importing. Horizon gives you several options that affect the way imported records affect your library's existing records.

You can choose one of these overlay options on the Multi-Format Import window for bib and authority records:

- **Never**. This keeps the existing matching records in your database, along with the newly imported matching bib records. Horizon logs a warning in an error log called the mistrake file so that you can deal with duplications. If Horizon finds a matching *authority* record, Horizon logs the authority record in the mistrake table and does not load it into the database as a new record unless the original record was system-generated. Incoming authority records always replace system-generated authority records. (For more information on system-generated authority records, see **About Authority Records** on page 113.)
- **Always**. This replaces the existing matching records in your database with the newly imported records.
- If **newer than local date**. This replaces existing records with incoming records only if the incoming records are newer, based on the date that the existing record was last changed on your system.
- **If newer than MARC date**. This replaces existing records with incoming records only if the incoming records are newer, based on the MARC date stored in the 005 and 008 tags.

In a MARC record, the 008 tag contains coded information that describes the record. Positions 14, 15, and 16 of the 008 tag of an authority record indicate whether the record is valid for use as a main or added entry, a subject added entry, or a series added entry. These are the record's use codes.

If a use code is set to "a," the authority is valid for that use. If a use code is set to "b," it is *not* valid for that use. (For example, if a record's use codes are set to "aab," the authority record can be used as a valid author or subject, but not for a series.)

During authority record import, Horizon may make an authority record match using match points or normalized main headings; however, the use codes in the records do not match. To handle this kind of situation, you can choose one of these overlay options:

- **Overlay if new auth Use Code validated.** This lets you determine whether Horizon will overlay an existing authority record never, always, or only if system-generated when the incoming record validates a use code. (A use code is validated when its setting indicates that Horizon can use the record for a specific authority type.)

  You can also choose to send a message to the Error Log indicating whether the overlay or merge took place, and if it did not, why not.

- **Overlay if auth Use Code Invalidated**. This lets you determine whether Horizon will overlay an existing authority record never, always, or only if system-generated when the incoming record *in*validates a use code. (A use code is invalidated when its setting indicates that Horizon cannot use the record for a specific authority type.)

You can also choose to send a message to the Error Log indicating whether the overlay or merge took place, and if it did not, why not.

If you choose to overlay when a use code is invalidated and the existing authority record is attached to a bib record for that use type, Horizon overlays the existing record, but does not invalidate the use code. Horizon also sends a message to the Error Log.

- **Create new bib if not overlaid.** This lets Horizon create a new bib record when the existing bib record is not overlaid.
- **Create new auth if not overlaid**. This lets Horizon create a new authority record when the existing authority record is not overlaid.

Depending on your overlay choices, Horizon tries to validate or invalidate an authority record for use as a subject by doing one of these things:

If you chose this	Horizon does this
Always overlay	Overlays the existing record with the incoming record and changes the record’s use code.
Never overlay	Does not overlay the exiting record.
Overlay only if system-generated	One of these options: • If the record was system-generated, overlays the existing record with the new record. • If the record was *not* system-generated, does not overlay the existing record.

An incoming record may validate one use code and invalidate another use code in the same record. If you have chosen only one of the validation overlay options so that Horizon gets instructed to both overlay and not overlay that record, Horizon does not overlay the record.

You can choose one overlay option and one delete option for item records:

- **Overlay Items: Never.** This keeps the existing matching item records in your database and imports the new matching item records as duplicates. Horizon logs a warning in the mistrake file.
- **Overlay Items: Always.** Horizon overlays any matching item on the database.
- **Delete Items: Never**. Horizon does not delete existing item records from the database.
- **Delete Items: Always.** Horizon deletes the item records from the database.

Here is a summary of how overlay affects the way Horizon handles MARC records during import:

Type of record	Overlay enabled	Overlay *not* enabled
Bib record	The incoming bib record overlays a matching bib record on the database if one exists; otherwise, Horizon creates a new bib record.	Horizon creates a new bib record. If a matching bib record exists on the database, Horizon records this on the mistrake table.
Authority record	The incoming authority record overlays a matching record on the database if one exists; otherwise, Horizon creates a new authority record.	Horizon creates a new authority record unless the database has a matching record. If a matching authority record exists on the database, Horizon records this on the mistrake table.
Item record	The incoming item record overlays a matching item on the database if one exists; otherwise, Horizon creates a new item record.	Horizon creates a new item record unless the database has matching record. If a matching item record exists on the database, Horizon records this on the mistrake table.

All choices you make for overlaying records must be met before Horizon will overlay any record. (For more information, see "Setting Up Import Source Parameters" in the *Cataloging Setup Guide*.)

Importing Bib and Authority Records

You import bib and authority records from a computer file. The import source profile and the Multi-Format Import window choices determine how the new records become a part of your database.

You can import item information without overlaying bib records. (For instructions, see **Importing Embedded Item Information without Overlaying Existing Bib Records** on page 247.)

To import bib and authority records

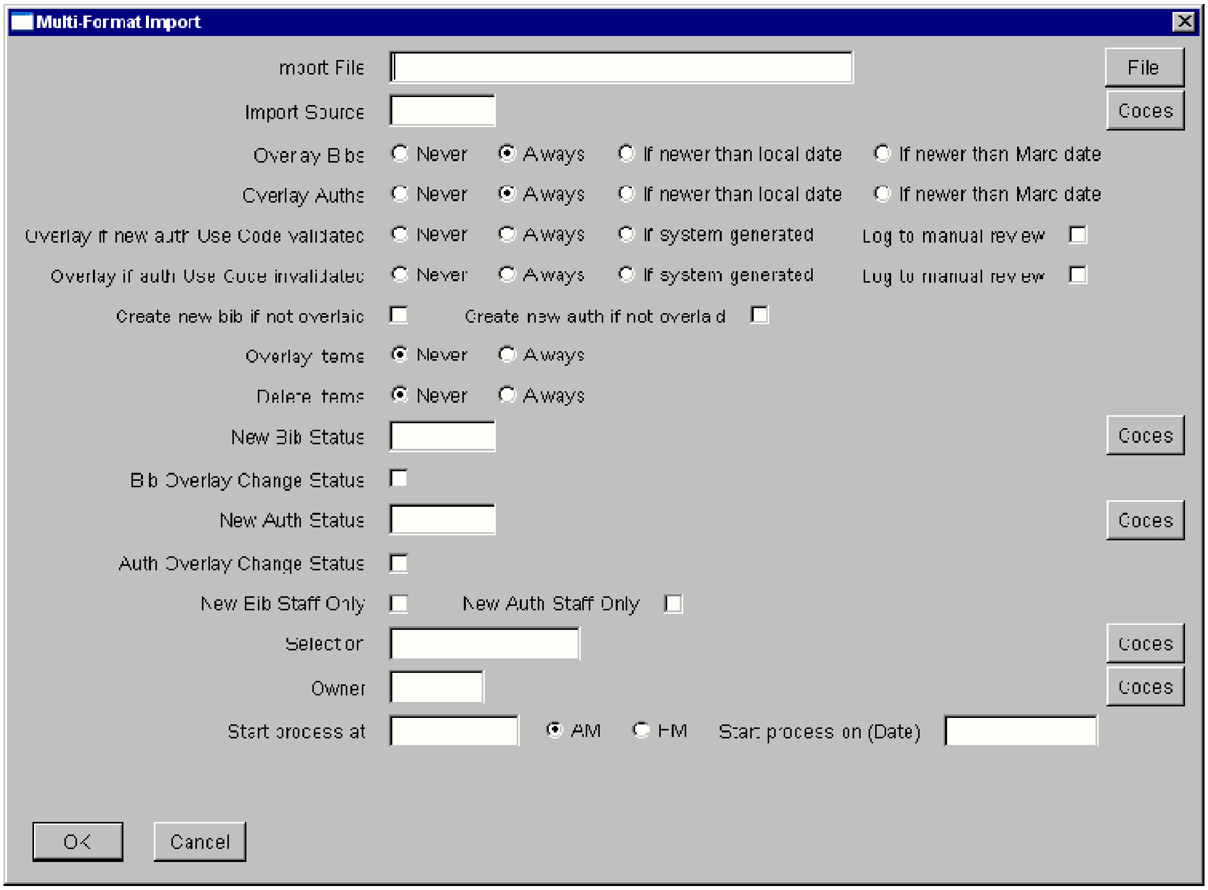
1 Do one of these options:

- Insert the floppy disk that contains the files that you want to import into your workstation's disk drive.
- Identify the directory on your workstation where the files that you want to import are located.

2 Start the **Import** process.

The default location of this process is the **Cataloging** folder on the navigation bar.

Horizon displays the Multi-Format Import window:



If you have imported records before, the same settings display as you entered previously. You can override these settings.

If you enter a new import file name or click the File button to choose an import file, the new file path displays as the default setting on the next import session. However, you will have to enter a new file name.

3 Complete these fields:

Field	Action
Import File	Enter the file name. If you do not know the file's path, click **File** to display the **Choose a file** dialog box and locate it.

Field	Action
Import Source	Enter the code for the import source, or click **Codes** for a list of valid options.(For more information, see **Understanding Import Sources** on page 236.) Check with your system administrator if you are unsure of the parameters that each code specifies.
Overlay Bibs and Overlay Auths	Mark one of these options for bib records and one for authority records: • **Never**. Incoming records never overlay existing records. • **Always**. Incoming records always overlay existing records. • **If newer than local date**. Incoming records overlay existing records if they are newer than the local date (the date that a record was last changed on your system). • **If newer than Marc date**. Incoming records overlay existing records if they are newer than the MARC date stored in tags 005 and 008. These tags are not automatically updated. If you do not manually update these dates, you can be sure to overlay with newer versions of the MARC records from your MARC record supplier. (For more information, see **Overlay Options** on page 238.) **Note:** System-generated authorities are always overlaid, regardless of the box marked.
Overlay if new auth Use Code validated	Mark one of these options: • **Never**. Incoming authority records never overlay existing records if the new authority use code is validated. • **Always**. Incoming authority records always overlay existing records if the new authority use code is validated. • **If system generated**. Incoming authority records overlay existing records if the existing record is system generated and the new authority use code is validated. A use code is validated when its setting indicates that Horizon can use the record for a specific authority type.
Log to manual review	If you want to send a message to the Error Log indicating whether the valid use code overlay or merge took place, and if it did not, why not, mark this box.

Field	Action
Overlay if auth Use Code Invalidated	Mark one of these options: • **Never**. Incoming authority records never overlay existing records if the new authority use code is *in*validated. • **Always**. Incoming authority records always overlay existing records if the new authority use code is *in*validated. • If system generated. Incoming authority records overlay existing records if the existing record is system generated and the new authority use code is *in*validated. A use code is invalidated when its setting indicates that Horizon cannot use the record for a specific authority type.
Log to manual review	If you want to send a message to the Error Log indicating whether the invalid use code overlay or merge took place, and if it did not, why not, mark this box.
Create new bib if not overlaid	If you want to let Horizon create a new bib record when the existing bib record is not overlaid, mark this box.
Create new auth if not overlaid	If you want to let Horizon create a new authority record when the existing authority record is not overlaid, mark this box.
Overlay Items	Mark one of these buttons: • **Never**. Incoming item records never overlay existing records. • **Always**. Incoming item records always overlay existing records.
Delete Items	Mark one of these buttons: • **Never**. Horizon does not delete items from the database. • **Always**. Horizon always deletes items attached to a bib record being overlaid on the database.
New Bib Status	If no default exists or if you want to override the default, enter a new bib record status, or click **Codes** for a list of valid options. (For more information, see **Changing a Bib or Authority Record's Status** on page 231.)
Bib Overlay Change Status	If you want to replace the current bib record status with the status of the overlaying bib records that you are importing, mark this box.

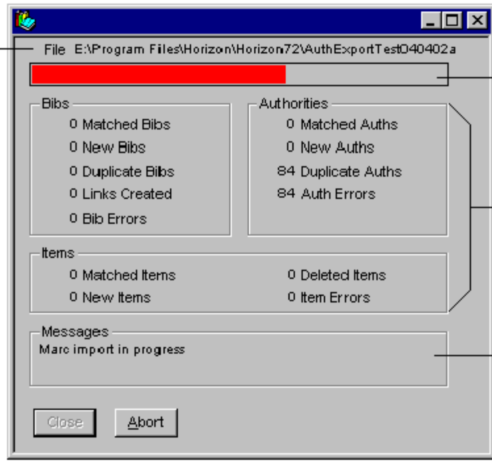
Field	Action
New Auth Status	If no default exists or you want to override the default, enter a new authority status, or click **Codes** for a list of valid options. (For more information, see **Changing a Bib or Authority Record’s Status** on page 231.)
Auth Overlay Change Status	If you want to replace the current authority status with the status of the overlaying authorities that you are importing, mark this box.
New Bib Staff Only and New Auth Staff Only	If no default **Staff Only** setting exists, or if you want to override the defaults, mark the appropriate boxes. **Note:** If an incoming record is flagged as Staff Only, only staff workstations can search for and display that record if public-only indexes are set up.
Selection	If you want to, enter the code for the selection list to which the imported items belong, or click **Codes** for a list of valid options. (For more information, see **Using a Selection List** on page 88.)
Owner	If you want to, enter the code for the ownership that can change these records, or click **Codes** for a list of valid options. If you do not enter a code, Horizon uses the default owner.
Start process at	Enter the time that you want Horizon to start importing records. Make sure that you also mark AM or PM. If you want to begin importing immediately, leave this field and the date field blank. **Note:** If you set an import time, you must leave the workstation open with Horizon running.
Start process on (Date)	Enter a date. If you want to begin importing immediately, leave this field and the time field blank. **Note:** If you specify a date, you must also specify a time.

4 Click **OK.**

If the time you enter is more than 12 hours in the future, Horizon displays a warning message box prompting you to confirm the time.

Horizon closes the Multi-Format Import window.

When the import process begins, Horizon displays the MARC Import Status window:



If you scheduled a time to import, the window displays the current date and time and the date and time of import.

The MARC Import Status window displays this information during import:

Field	Description
File	Displays the path and name of the file that you are importing.
Bibs: Matched Bibs	Displays a count of incoming bib records that have overlaid matching bib records in the database.
Bibs: New Bibs	Displays a count of new bib records created. **Note:** If Overlay Bibs was not specified and a matching bib record is found, Horizon creates a bib record and reports the match in the mistrake table.
Bibs: Duplicate Bibs	If Overlay Bibs was not specified, displays a count of incoming bib records that had matches on the database, but which Horizon imported anyway. Horizon reports the duplicates on the mistrake table.
Bibs: Links Created	Displays the number of links created between bib records.
Bibs: Bib Errors	Displays a count of incoming bib records that Horizon cannot put in your database because they are not in correct MARC format, or because errors exist in your database. You can view the records with errors in the error log. (For more information, see **Using the Error Log** on page 248.)

Field	Description
Authorities: Matched Auths	Displays a count of incoming authority records that have overlaid matching authority records on the database. **Note:** Horizon always overlays system-generated authority records, regardless of the Overlay Auths setting.
Authorities: New Auths	Displays a count of new authorities created. **Note:** If Overlay Auths was not specified and a matching authority record is found, Horizon does *not* create a new authority record and reports the match in the mistrake table.
Authorities: Duplicate Auths	If Overlay Auths was not specified, displays a count of incoming authority records that match records on the database, but which Horizon imported anyway. Horizon records the duplicates on the mistrake table.
Authorities: Auth Errors	Displays a count of incoming authority records that Horizon cannot put in your database because they are not in correct MARC format, or because errors exist in your database. You can view the records with errors in the error log. (For more information, see **Using the Error Log** on page 248.)
Items: Matched Items	Displays a count of incoming item records that have overlaid matching item records in the database.
Items: New Items	Displays a count of new item records created.
Items: Deleted Items	Displays a count of items deleted from the database when the incoming bib records did not have matching items. Horizon determines the items to delete by barcode.
Items: Item Errors	Displays a count of incoming items that could not be created or overlaid because of database errors or missing information. Horizon records these errors on the mistrake table.
Messages	Displays instructions for resolving errors. May also include the batch number that you need to reference to locate errors from this import in the error log.

Note: You can click **Abort** at any time to stop the import.

You can view new records using the **New Additions** processes. The default location for these processes is the Searching\New Additions folder on the navigation bar. You can view errors in the Error Log window. (For more information, see **Resolving an Import Error** on page 248.)

Important: If you use an import source with a profile that does not allow Horizon to create item records, Horizon imports only the bib records. You must create an item record for each item that you add to your collection.

Importing Embedded Item Information without Overlaying Existing Bib Records

Vendors sometimes ship brief bib records that can serve as placeholders until you enter a full bib. These brief bib records may also contain embedded item information. If a brief bib record replaces an existing full bib record, the embedded item information in the brief bib overwrites any item information that may have been part of the full bib. In addition, you must reconstruct the full bib record manually, and delete the brief bib from the database or retrieve the brief bib and re-create it.

In order to import embedded item information without overlaying an existing bib record, your system administrator must set your import source parameters so that Horizon knows whether to create new item records for just new bibs or for both new or matched bibs. (For instructions, see “Setting Up General Import Source Parameters for Bib and Auth Records” in the “Setting Up Import Source Parameters” section of the *Cataloging Setup Guide*.) Then you can choose options on the Multi-Format Import window that tell Horizon whether to create a new bib record if there is no matching bib in your database. This lets you choose whether to import the embedded item information only, or create an entirely new bib record.

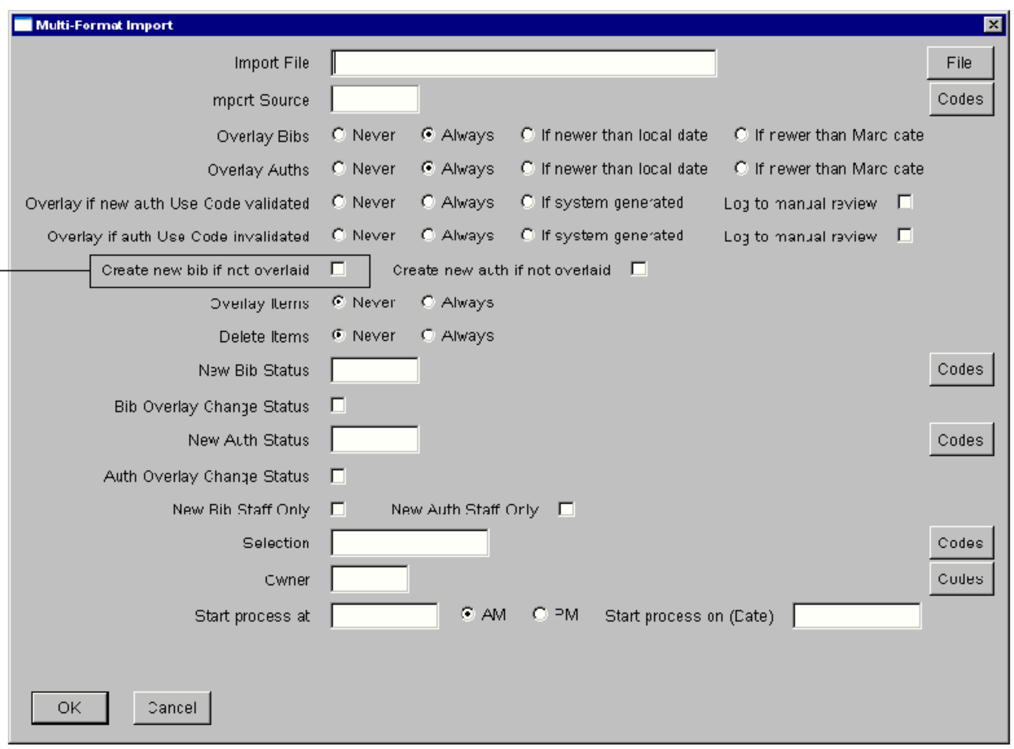
To import embedded item information without overlaying existing bib records

1 Start the **Import** process.

The default location of this process is the **Cataloging** folder on the navigation bar.

Horizon displays the Multi-Format Import window:

Mark this field if you want to import item information without overlaying an existing bib record.



2 Complete or update these fields:

Field	Action
Overlay Bibs	Choose **Never**.
Overlay Items	Choose **Never**.
Create new bib if not overlaid	Unmark this field. If you mark this field, Horizon creates a new bib record when the existing bib record is not overlaid.

3 Click **OK** to import the records.

When Horizon finds a bib record match, it will not overlay it or create a new record, but any item information associated with the record is updated. (For more information on bib record match points, see “Setting Up Bib and Authority Match Points” in the “Setting Up Import Source Parameters” section of the *Cataloging Setup Guide*.)

Resolving an Import Error

Horizon does not transfer imported records with errors into your database. It stores any incoming records with errors in an error log. The error log also holds lists of records that may be duplicates, or which may have other conflicts with your existing records. For each import session, Horizon stores the errors in a batch table and lists the batch number in the Import Status window.

This section explains common import errors and how to resolve them. It explains these topics:

- **Using the Error Log** on page 248
- **Copying an Error Record into Notepad** on page 250
- **Resolving a MARC Record Error** on page 250
- **Resolving a Database Error** on page 252
- **Deleting an Error from the Error Log** on page 255

Using the Error Log

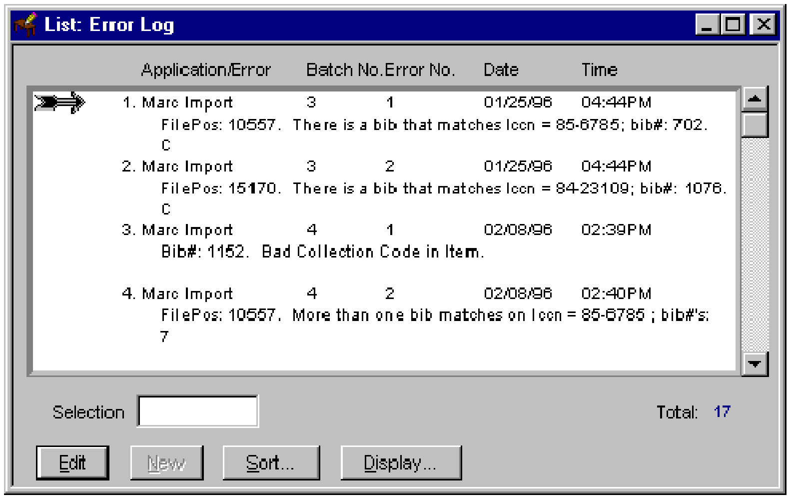
The Error Log lists any errors Horizon finds during a record import. By logging the errors, Horizon helps you keep your database error-free. After a record import, the MARC Import Status window tells you of any errors and displays a batch number. You look up the batch in the Data Load Error Log and deal with the errors one at a time. After you resolve each error, you delete its reference in the error log. This keeps your error log current, so you know which errors you still need to resolve.

To use the Error Log

1 Start the **Data Load Error Log** process.

The default location of this process is the **Administration** folder on the navigation bar.

Horizon starts the table editor and displays the List Error Log window:



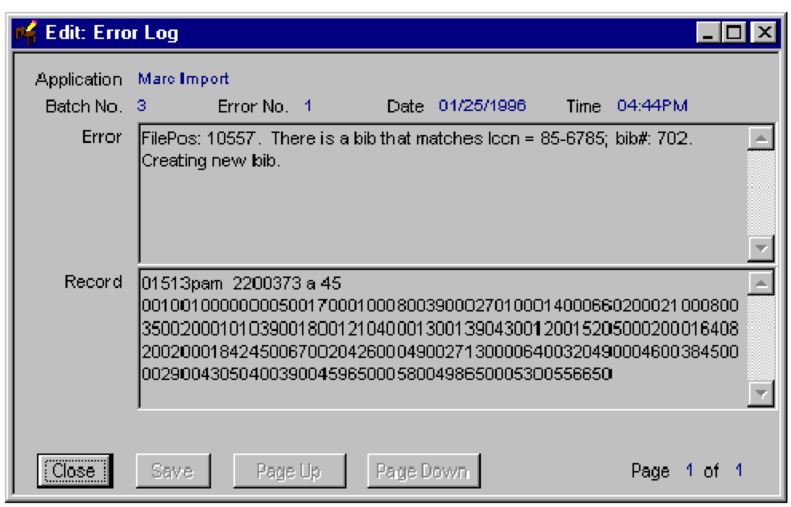
2 Do one of these options:

- Sort the list by batch and error number to display the errors from the batch that you want to work with in order.
- Choose **File**, followed by one of the search options (**Search, Where clause**, or **Compound Search**), and locate the errors that you want to work with.

  (For more information, see "Using the List Search Window" in the "Getting Started" chapter of the *System Administration Guide*.)
- Scroll through the List Error Log window to find an error that you want to work with.

3 Double-click on the error that you want to view in detail.

Horizon opens the Edit Error Log window:



The Edit Error Log window displays information that describes the error and Horizon's resolution of it. It may also display the record in the lower panel. If it does, you can scroll through the record and look for the title. If you need to take further action with this record, make a note of the title and author so that you can open it in the MARC Editor. (For more information, see **Finding and Opening an Existing Bib Record** on page 83.)

4 When you finish using the Edit Error Log window, click **Close**.

5 When you finish using the Error Log, choose **File, Exit**.

Copying an Error Record into Notepad

If you find it difficult to read the record in the limited field space provided in the error log, you can copy and paste the record into Notepad.

To copy an error record into Notepad

1 Locate the error that you want to view in Notepad. (For instructions, see **Using the Error Log** on page 248.)

2 Highlight the information in the **Record** field.

To do this, right-click the **Record** field and choose **Select All** from the pop-up menu.

3 Choose **Edit, Copy**.

Horizon copies the record to the computer's clipboard.

4 From the Windows **Start** menu, choose **Programs, Accessories, Notepad**.

Notepad opens a blank document.

5 Choose **Edit, Paste**.

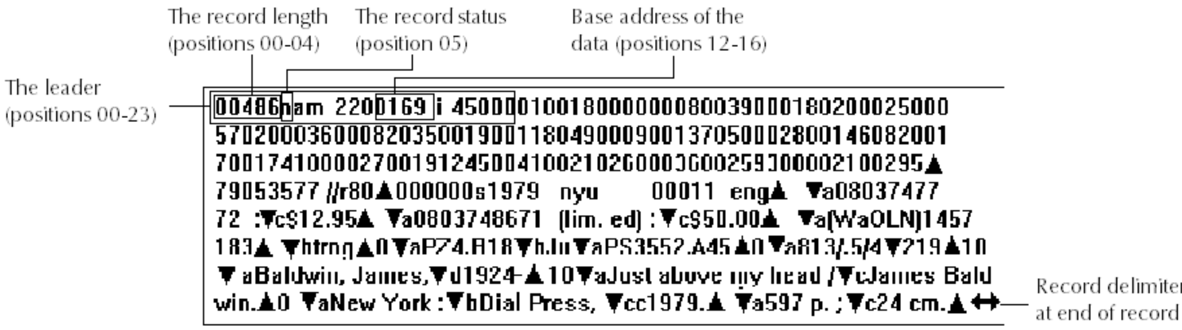
The text that you copied from the Error log is pasted into Notepad.

Note: You can copy and paste an error record into some other word processing programs. Follow the same steps, but open the word processing program instead of Notepad. Depending on the font capabilities of the word processor that you use, Unicode characters may or may not display correctly.

Resolving a MARC Record Error

At the time of import, Horizon checks that all incoming records are in MARC format. Occasionally Horizon reports errors in the leader, which includes the first 24 characters of the record. Each position has an assigned meaning. (For more information, see Library of Congress publications about MARC, or visit the Library of Congress web site at http://lcweb.loc.gov/marc/.)

Here is an example of a bib record in MARC format showing where errors might occur:



Depending on how your word processor imports the characters, the marks between MARC fields may display differently than in this example.

This table explains errors that may occur in each position:

Position	Description of errors
Leader (positions 00-23)	If the record you imported contains less than 24 positions or does not contain a leader, Horizon displays this error message: “Record length is less than minimum record size.”
Record length (positions 00-04)	If the record you imported contains non-numeric characters in these positions, Horizon displays this error message: “MARC record length field non-numeric.” If the record you imported contains fewer bytes than the first five positions indicate, Horizon displays this error message: “End of file reached before end of MARC record.”
Record status (position 05)	If the record you imported contains a numeric character or a character that is not MARC-defined, Horizon displays an error message.
Base address (positions 12-16)	If the record you imported contains a number in this section of the leader that does not match the actual position of the first character of the first MARC field, Horizon displays this error message: “Base offset is not numeric. Base offset is not correct.”
Record delimiter (end of record)	If the record you imported does not end with a record delimiter, Horizon displays this error message: “MARC record does not end with record delimiter.”

To resolve a MARC record error, you must either get a new record from the vendor or edit the record in Notepad so that it is correct according to MARC standards. Then save and import the record. (For more information about editing a file in Notepad, see your Notepad documentation.)

If you make changes to the file in Notepad or in another word-processing program, be sure that you make changes that are accurate and in the right positions. Follow these guidelines:

Do not delete necessary characters or add unnecessary characters.

Make sure that you save the file with the same file name—do not let Notepad add ".txt" to the file name. (For example, if the file name is "123.dat," make sure that when you save the file after making your changes, Notepad does not name it "123.dat.txt.") If Notepad saves the file with a .txt extension, rename the file back to the original name in Windows Explorer. (For instructions, see your Windows Explorer documentation.)

Resolving a Database Error

This table lists some common import errors that have to do with the state of existing records in your database. It also gives suggestions on how to resolve the problem. (If Horizon displays an error message that is not in this chart, contact your system administrator.)

Error Message	Meaning	Solution
Can't find last change date in existing MARC record xxx.	The existing record has no valid 005 or 008 tag, and the Horizon-maintained last change date is invalid. No overlay takes place and no new MARC record is created.	Do one of these options: • Add a valid 005 or 008 tag to the existing record, then reimport the match. • Reimport the record. In the Multi-Format Import window, mark the **Always** button in either the Overlay Bibs field or the Overlay Auths field (depending on whether the record with the error is a bib or an authority record).
Can't find last change date in incoming MARC record xxx.	The incoming record has no valid 005 or 008 tag. No overlay takes place and no new MARC record is created.	Reimport the record. In the Multi-Format Import window, mark the **Always** button in either the Overlay Bibs field or the Overlay Auths field (depending on whether the record with the error is a bib or an authority record).
Cannot delete a bib with serial copies attached.	The MARC leader on the incoming record was flagged for deletion, but the bib record had serial copies attached to it.	Do these steps: 1. Delete the serial copies in the **Serials** process. 2. Delete the bib record in Cataloging.
Database error/Attempted to insert a duplicate row.	This message indicates a problem with one of the indexes.	Contact your system administrator.

Error Message	Meaning	Solution
Found match for xxx in auth table. However, now cannot load that auth. Creating a new auth.	An authority record that existed moments ago now cannot be loaded. A new authority record will be created.	Find the duplicate authority records and merge them.
Found match for xxx in bib table. However, now can't load that bib. Creating a new bib.	A bib that existed moments ago now cannot be loaded. A new bib record will be created.	Do one of these options: • Find the duplicate bib records and merge them. • Delete the bib records you do not want to keep.
Found more than one match for xxx in auth. Not creating new auth.	Horizon found more than one auth# match. The auth table might have a problem.	Contact your system administrator.
Found more than one match for xxx in bib table. Couldn't delete bib.	Horizon found more than one bib record for a bib number on a bib# match.	Contact your system administrator.
Found more than one match for xxx in bib. Creating new bib.	Horizon found more than one bib# match.	Contact your system administrator.
Item create message. Item creation error. Use Table Editor to view Error Log for Application "Item Import."	Some type of error occurred while creating items after creating a bib.	Do these steps: 1. Double-check item import parameters for any inconsistencies. (For more information, see "Setting Up Import Source Parameters" in the *Cataloging Setup Guide*.) 2. Reimport the bib record or manually create the items.
Matched on xxx = xxx; auth# = xxx. However, auth# does not exist in auth table. INDEX NEEDS FIXING. Creating a new auth.	A match based on a Horizon index succeeded, but the referenced authority record does not exist. Import will create a new authority.	Try loading the bib record again. If Horizon displays the same message, contact your system administrator.
Matched on xxx = xxx; bib# = xxx. However, bib# does not exist in bib table; INDEX NEEDS FIXING. Creating new bib.	A match based on a Horizon index succeeded, but the referenced bib record does not exist. Import creates a new bib.	Fix the index on which the match is based.

Error Message	Meaning	Solution
More than one auth matches on xxx = xxx; auth#'s: xxx, yyy, zzz. Not creating new auth.	The import has a problem.	Contact your system administrator.
More than one bib matches on xxx = xxx; bib#: xxx, yyy, zzz. Couldn't delete bib.	Incoming bib record is flagged as deleted. Found more than one possible match based on a Horizon index. None of these matched bibs will be deleted.	Do one of these options: • Find all bibs listed and merge them. • Delete the bib records that you do not want to keep.
More than one bib matches on xxx = xxx; bib#s xxx, yyy, zzz. Creating new bib.	The Horizon index match returned more than one possible bib record match. Import will create a new bib.	Do one of these options: • Find all bibs listed and merge them. • Delete the bib records that you do not want to keep.
Mq Index xxx, specified in table yyy, does not exist.	The specified mq index "xxx" was designated as a match point in bib_match_point or auth_ match_point (the appropriate one is displayed), but is not a valid index. A new MARC record will be added.	Do one of these options: • Find all records listed and merge them. • Delete the records that you do not want to keep. • Delete the bad mq_index from the match point table.
Record on file is newer than record being imported. Not overlaying.	The last change date of the existing record is more recent than that of the incoming record, and overlay was not indicated (for MARC records). No overlay takes place, and no new record is created.	Do one of these options: • If you want to keep the existing record, ignore the error. • If you want to keep the incoming record, reimport the record. In the Multi-Format Import window, mark a box to allow overlay in either the Overlay Bibs field or the Overlay Auths field (depending on whether the record with the error is a bib or an authority record).
Tag to keep (xxx) exists in both existing and incoming records. Not overlaying.	An instance of a nonrepeatable tag was found in both the existing MARC record and the incoming record where the text was different. No overlay takes place, and no new record is created.	Do one of these options: • Delete the nonrepeatable tag in the existing record, then reimport the new record. • Edit the import source to delete the nonrepeatable tag, then reimport the record. • Ignore the problem.
There is a bib that matches xxx = xxx; bib#: xxx. Creating a new bib.	Although overlay was not indicated, a match was found anyway. A new bib record will be created.	Do one of these options: • Find all bib records listed and merge them. • Delete the bib records you do not want to keep.

Error Message	Meaning	Solution
There is a bib# xxx. Creating new bib.	Horizon found a direct bib# match, but overlay was not indicated.	Do one of these options: • Find the two bib records and merge them. • Delete the bib record that you do not want to keep.
There is an auth that matches xxx = xxx; auth#: xxx. Not creating new auth.	Horizon found an authority match based on the indicated Horizon index, but overlay was not indicated.	If you want to replace the existing authority with the match, turn on the overlay option and reimport the authority; otherwise, do nothing.
There is an auth# xxx. Not creating new auth.	Horizon found a direct auth# match, but overlay was not indicated.	If you want to replace the existing authority record with the match, turn on the overlay option and reimport the authority; otherwise, do nothing.

Deleting an Error from the Error Log

Once you have corrected an import error, you can delete the reference to that error in the error log. This keeps your error log current so it holds only those errors that you still need to deal with.

To delete an error from the error log

1 Start the **Data Load Error Log** process.

The default location of this process is the **Administration** folder on the navigation bar.

2 Highlight one or more errors on the **List Error Log** window.

3 Choose **File, Delete Record**.

Horizon displays a message asking if you want to delete the highlighted records.

4 Click **OK**.

Horizon deletes the records.

Exporting MARC Records

You can export MARC records to a floppy or hard disk. Exporting MARC records saves a duplicate of the records to a designated file. The original records remain unchanged in your Horizon database.

This section explains these topics:

- **Exporting Open Records** on page 256
- **Choosing Batches of Records for Exporting or Printing** on page 257

Exporting Open Records

You can export records after you open them. This task works best if you can easily locate and open the records to export. If you cannot, you may want to batch export them instead.

To export open records

1 Open the records that you want to export. (For instructions, see **Finding and Opening an Existing Bib Record** on page 83 and **Finding and Opening an Authority Record** on page 116.)

You can export several records at once. Each one must be open either as an icon (minimized at the bottom of your workspace) or as a full record (displayed in the MARC Editor).

Note: When you export a bib record that has item records attached, you can export the item information with that bib record if your system administrator has set up export parameters. (For more information, see “Setting Up Export Parameters” in the *Cataloging Setup Guide*.)

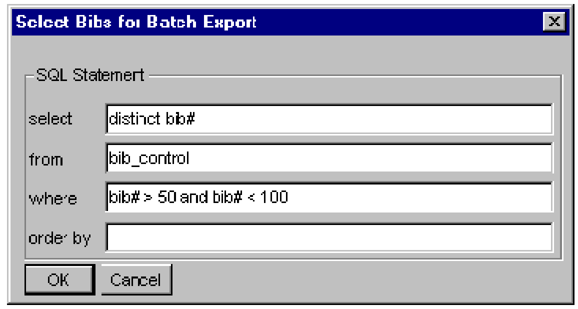
2 Choose **File, Export Record**.

Horizon opens the Code Lookup Export Target dialog box.

Note: An export target defines export parameters such as the item tag, column, and subfield that stores the information that you are exporting. Horizon does not ship with targets. Your system administrator must set them up. (For more information, see “Setting Up Export Parameters” in the *Cataloging Setup Guide*.)

3 Highlight a target and click **OK**.

4 Do one of these options:

If only one bib or authority record is open	If more than one bib or authority record is open
Horizon opens the Save to a File dialog box. Save the file as you would save any data file. (For instructions, see **Saving and Closing a MARC Record** on page 79.)	Horizon opens the Select Bibs for Batch Export dialog box:  Do these steps: 1. Highlight each record that you want to export. 2. Click **OK**. Horizon opens the Save to a File dialog box. 3. Save the file.

Horizon closes the Save to a File dialog box and saves a copy of the records in the place that you designated. The original records remain in your database.

Choosing Batches of Records for Exporting or Printing

Horizon lets you export batches of MARC records to a disk. You might do this if you want to send records that need updating to a different location. Once the update is complete, you import the updated records back into your system and overlay the originals. You can also send batches of MARC records to a printer.

When you export a bib record that has item records attached, you can export the item information with that bib record. (For more information, see “Setting Up Export Parameters” in the *Cataloging Setup Guide*.)

You use Structured Query Language (SQL) statements to choose the bib records that you want for exporting or printing. You use SQL statements and Horizon criteria to choose the authority records that you want for exporting and printing.

An SQL statement lets you search for records that contain or match specific data so that you can batch export or batch print the records. After you choose the task that you want to do, the steps for both of these tasks are the same.

To make an SQL statement, you can specify these things:

- The column of the table that you want to search by.
- One or more Horizon tables that you want to search under.
- The specific conditions of the search. (This is optional. If you do not enter conditions, Horizon selects the entire table.)
- How you want to sort the chosen records. (This is optional.)

You can search under any table that contains the type of records that you want. (For example, if you want to choose bibs, you can search under any table that has bib# as a column. Then you can choose to specify the conditions of the search [<, >, =, and so forth]. Finally, you can choose to order or sort the records by any column in that same table.)

SQL experts can specify more complex SQL statements, including searching under multiple tables, joining relational operations, making subqueries, and so forth.

Refer to Appendix B for a list of possible tables, columns, and examples. (For SQL statements error messages, see **Troubleshooting a Batch Export** on page 261. For a more extensive list of Horizon tables, see the *Table Structures Guide*.)

You must follow these guidelines when entering SQL statements:

Enter a date in the form of month-day-year, such as 3-15-03.

Enter text in code format between quotation marks, including call numbers. If you do not know the code for a field, use the Table Editor to open an edit window for the table that you are searching under. (For more information, see “Using the List Search Window” in the “Horizon Table Editor” section of the “Getting Started” chapter of the *System Administration Guide*.)

Enter table names and columns exactly as they appear in Appendix: Appendix B, "SQL Statements" on page 275.

You can also use Horizon criteria to choose authority records to batch export and batch print. After you choose the task that you want to do, the steps for both of these tasks are the same.

You can use Horizon criteria with or without an SQL statement.

Horizon criteria for choosing authority records to export or print include these things:

- **Generate Type**. Specifies how the authority was created, or generated. An authority can be created in one of two ways:
  - **System-Generated**. These are authorities that Horizon creates when no existing authority record matches an authority tag in a bib record. This can happen when you add an authority tag to a bib record or when you import bib records.
  - **Non-System-Generated**. These are imported authorities, authorities you create, or system-generated authorities that you edit.
- **Created between and by**. Specifies a date range between which the authority was created. Also specifies who created the authority.
- **Updated between and by**. Specifies a date range between which the authority was updated. Also specifies who updated the authority.
- **Status type, changed between and by**. Specifies a date range between which the authority status was changed. Also specifies who changed the status of the authority.
- **Auth# between**. Specifies a range of authority record numbers.

- **Alpha Range**. Specifies an alphabetical range for authority headings. (For example, you can choose authority records with headings that start with "a" through "g.")

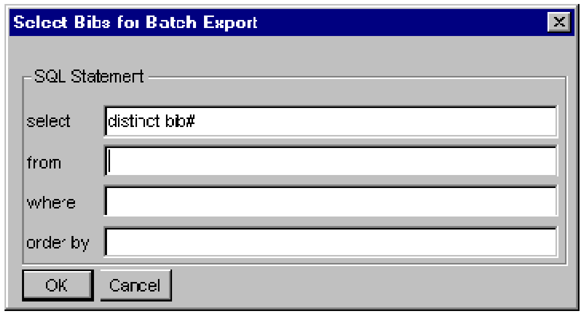
You can use as many or as few criteria as you want. You can include elements from both an SQL statement and Horizon criteria. If you do not use any criteria or SQL statement terms to narrow your search, Horizon selects all the authorities in your database.

To choose batches of records for exporting or printing

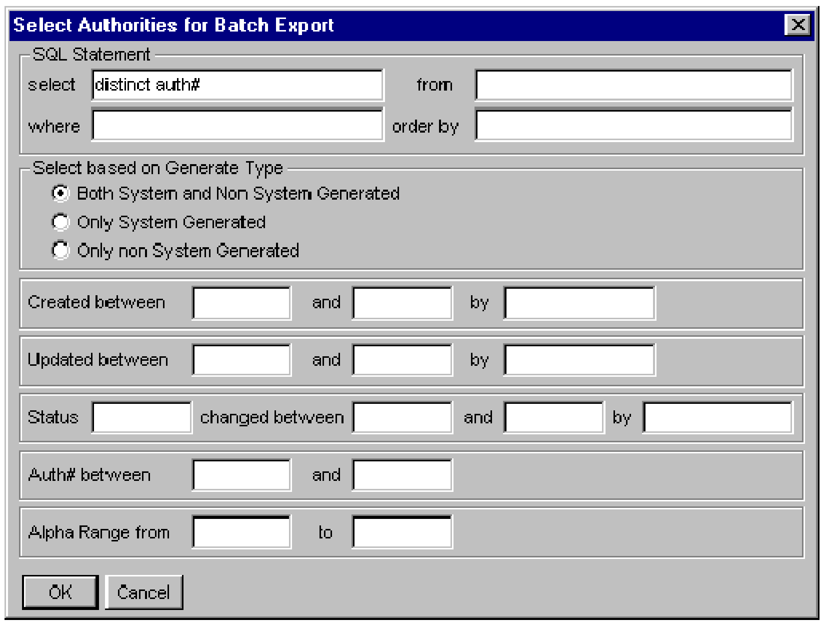
1 Do one of these options:

If you want to do this	Do this
Choose bib records to export	1. Start the **Batch Bib Export** process. The default location of this process is the **Cataloging\Export** folder on the navigation bar. 2. Highlight the target that you want to use for exporting the bib records. 3. Click **OK**. (If no targets are set up, see your system administrator.) Horizon opens the Select Bibs for Batch Export window.
Choose bib records to print	1. Start the **Batch Bib Print** process. The default location of this process is the **Cataloging\Bibliographic Record** folder on the navigation bar. Horizon opens the Select Bibs for Batch Print window.
Choose authority records to export	1. Start the **Batch Auth Export** process. The default location of this process is the **Cataloging\Export** folder on the navigation bar. Horizon opens the Code Lookup Export Target dialog box. 2. Highlight the target that you want to use for exporting the authority records. 3. Click **OK**. Horizon opens the Select Authorities for Batch Export window.
Choose authority records to print	1. Start the **Batch Auth Print** process. The default location of this process is the **Cataloging\Authority Record** folder on the navigation bar. Horizon opens the Select Authorities for Batch Print window.

If you chose to export or print bib records, Horizon displays a Select Bib for Batch Export dialog box:



If you chose to export or print authority records, Horizon displays a Select Authorities for Batch Export window:



2 Complete these fields in the SQL Statement group as necessary:

Field	Action
select	Change the default in this field if you want to select a column other than bib# or auth#. You can enter two or more selections separated by commas.
from	Enter a table that contains the column that you specified in the select field.
where	Enter the conditions of the search in this field. You can use Boolean operators to enter two or more criteria. If you leave this field blank, Horizon selects the entire table in the from field.

Field	Action
order by	If you want to, enter the columns that you want to use to sort the records. You can enter two or more columns separated by commas.

3 If you are working with authority records, do these steps:

a Mark the button in the **Select based on Generate type** group for the type of authorities that you want to export.

b If you want to, enter any ranges or operators that you want to use in the appropriate fields.

4 Click **OK**.

5 Do one of these options:

- If you chose to export the records, Horizon displays the Save to a File dialog box.

  Save the file.

  Horizon closes the Save to a File dialog box and saves a copy of the records where you designated. The original records remain in your database.

- If you chose to print the records, Horizon displays the Printer Setup dialog box.

  Print the file.

  Horizon prints the records that you chose.

Troubleshooting a Batch Export

This table lists common error messages that you might receive when you use the SQL statements or Horizon criteria to choose batches of records for exporting or printing. It also gives the meaning of the error message, shows an example of what might have caused Horizon to display it, and suggests a solution for the problem:

Error Message	Meaning	Example	Solution
Bad Date	This message displays when you specify an invalid date when batch printing or exporting authorities.	Updated between: 15 Jan 1996 and 27 Jan 1996	Replace the invalid date with a valid date. Dates must be in this format: mm-dd-yy

Error Message	Meaning	Example	Solution
Batch x Error Only one column is allowed in ‘select’ box. x=bib if you are exporting or printing bib records or x= auth if you are exporting or printing authority records.	This error message displays when the select field has more than one column separated by a comma.	Select distinct bib#, auth#.	Enter only one column in the **select** field—it can be any valid column name from the table in the **from** field.
Batch x Warning Please make sure that the query will return y x=bib and y=bib# if you are exporting or printing bib records or x= auth and y=auth# if you are exporting or printing authority records.	This warning message displays when the select field contains a column name other than bib# or auth#. This warning message reminds you that Horizon expects a list of bib#/auth# back from the SQL query.	Select bib#==> no warning message Select distinct bib#==>warning message	Click **OK**.
Empty SQL statement	This error message displays when you are exporting or printing bib records and the from field is empty.	Choose **File, Batch Bib Export**, then click **OK** without entering any further search criteria.	Enter a table in the **from** field.
Invalid Key	This error message displays when the result of an SQL query is not a key.	Select: tag From: bib Where: bib# < 1 and bib# < 10.	Redo the SQL query with a key type field in the **select** field, such as bib# or auth#.
Invalid Status	This message displays when you are batch printing or exporting authorities and you specify an invalid status in the status field.	Status: cataloging complete	Enter a valid status in the status field. You must enter the status code. (For information, see “Setting Up Bib and Authority Record Statuses” in the “Setting Up Import Source Parameters” section of the *Cataloging Setup Guide*.)

Error Message	Meaning	Example	Solution
Invalid User ID: x y z x=operator of create date (if it is not empty) y=operator of update date (if it is not empty) z=operator of status change date (if it is not empty)	This message displays when you specify an invalid operator in the by field when batch printing or exporting authorities.	by: Amy Benson	Enter a valid operator in the **by** field. You must enter the operator's user id.
One copy is allowed for batch print	This message displays when you specify more than one copy in the Printer Setup dialog box.	If you enter two copies in the Printer Setup dialog box, this message displays and then Horizon prints out one copy.	Horizon automatically prints out one copy.

Transferring a Record between Databases and Servers

Sometimes a MARC record that you want to open in the MARC Editor is on a different database than the one to which you are logged in. (For example, if you have a production database and a training database, you may want to move records from your production database to your testing database for testing or training purposes.) You can also move records from a different server.

When you send a record to the MARC Editor from a different database, Horizon treats it as a new record that you are importing. This means that you need to save the record after it displays in the MARC Editor in order for it to be indexed in the database to which you send it. Because Horizon does not alter the local (9XX) tags in the record that you send, you may want to edit or delete these tags before you save the record.

To transfer a record between databases and servers

1 Start the stand-alone staff search process.

   If you cannot find the stand-alone staff search process icon or executable file, see your system administrator to get access to `PuiLauncher.exe`.

   The search process opens the Horizon Sunrise startup dialog box.

2 Enter the user ID, password, server name, and database name for the Horizon library you want to search.

3 If you want to change the login options, click the **Options** button, and update the fields in the Login Options dialog box.

4 Click **OK**.

The search process displays a Search window.

5 Search for the record that you want.

6 Highlight the title or authority heading.

7 Choose **Edit, Send To Launcher**, or press **F10**.

Horizon opens the bib or authority record that you chose in the MARC Editor, but the stand-alone staff search process remains the active window.

8 If you want to send another record to Horizon from the database you are searching, repeat steps 5 through 7.

9 When you finish sending records to the MARC Editor, choose **File, Exit** to close the stand-alone staff search process.

10 Start the new MARC record you want to work with.

11 Make any changes you want to the new MARC record.

12 Save your changes.

Horizon assigns a number to the record and assigns the current date as the creation date.

Chapter 10: Non-MARC Editing

This chapter explains how to create and use non-MARC records. It also explains how to work with non-MARC workforms, including adding and deleting fields, and switching between MARC and non-MARC records.

This chapter contains these sections:

About Non-MARC Editing

Non-MARC editing lets you create and edit records in windows that display fields in which you enter information. Each field is labeled so that you know what information you should enter. You can create both bibliographic (bib) and authority records in a non-MARC format. Once you have created or edited a non-MARC record, you can convert it into a MARC record. You can also convert MARC records into non-MARC format, but this may result in lost data.

You can work in two types of non-MARC formats: static and dynamic. You must use static records as you see them—that is, you cannot add new fields or delete unused fields. In contrast, you can add or delete fields in dynamic non-MARC records while you are using them.

You must create non-MARC workforms for both authority and bib records before you can create or edit non-MARC records. (For more information, see **Creating a Non-MARC Workform** on page 221.)

Opening a Static or Dynamic Workform

Static and dynamic non-MARC workforms are templates for non-MARC records. They contain fields that have been predefined by your system administrator. You can edit, add, and delete fields on a dynamic workform, but you can only edit fields on a static workform.

To open a static or dynamic workform

1 Do one of these options:

- Start the **Create New Bib** process.

  The default location of this process is the **Cataloging\Bibliographic Record** folder on the navigation bar.

- Start the **Create New Auth** process.

  The default location of this process is the **Cataloging\Authority Record** folder on the navigation bar.

Horizon opens the Code Lookup Workforms dialog box.

2 Do one of these options:

- Double-click a static non-MARC workform.
- Double-click a dynamic non-MARC workform.

Horizon opens an empty workform of the type you specified.

Adding or Editing Information in an Existing Field

Non-MARC records have two types of fields:

- **Authority Fields**. These include the author, subject, and series fields of a bib record. Records generally contain one or more authority fields. The authority record supplies information for authority fields in a bib record. Authority headings need to remain consistent across records. Before adding an authority, you need to use staff searching to see if the authority already exists in your database. If it exists, attach it to the record.
- **Nonauthority Fields**. These include all of the fields of an authority record and the fields other than the author, subject, and series fields on bib records. If you have used staff searching and need to create a new authority record, you must fill all the fields on the authority workform. You add information directly into these fields.

This section explains these topics:

- **Adding Information in an Authority Field** on page 266
- **Editing or Deleting an Authority Field** on page 267
- **Adding or Editing a Nonauthority Field** on page 268

Adding Information in an Authority Field

To add information in an authority field

1 Do one of these options:

- Open a static or dynamic non-MARC bib record workform. (For instructions, see **Opening a Static or Dynamic Workform** on page 265.)
- Open an existing non-MARC bib record. (For instructions, see **Finding and Opening an Existing Bib Record** on page 83.)

- Open an existing MARC bib record and convert it to non-MARC form. (For instructions, see **Converting MARC and Non-MARC Records** on page 270.)

2 Click **Add** next to the authority field to which you want to add information.

Horizon opens an Add Authority dialog box.

3 Click **Search**.

Horizon displays the Search window.

4 Search for the authority you want to add.

Note: To conduct an authority search, you need to use authority search indexes, such as Subject Keyword, Author Keyword, Author Alphabetical, Subject Alphabetical, or Series Alphabetical.

5 Do one of these options:

If the authority record exists	If the authority record does not exist
1. Highlight the authority record. 2. Press **F10** or choose **Edit, Send to**. 3. Highlight the name of your non-MARC bib record. Horizon asks if you want to attach the authority to the bib record. 4. Click **Yes**. Horizon attaches the authority record.	1. Click **Cancel** or **OK** to close the search. 2. In the new bib record, click **Add** next to the Author field. Horizon opens an Add Authority dialog box. 3. Click **New Authority**. 4. Horizon opens an Auth new window. 5. Enter the new authority information. **Note:** For authors, enter the last name first. (For example, enter "Hawking, Stephen" instead of "Stephen Hawking.") 6. Save your changes.

Horizon returns to the non-MARC bib record and displays the authority information.

6 Make any other changes that you want to make to the bib record.

7 Save your changes.

Editing or Deleting an Authority Field

To edit or delete an authority field

1 Do one of these options:

- Open a static or dynamic non-MARC bib record workform. (For instructions, see See "Opening a Static or Dynamic Workform"**Opening a Static or Dynamic Workform** on page 265.)
- Open an existing non-MARC bib record. (For instructions, see **Finding and Opening an Existing Bib Record** on page 83.)

- Open an existing MARC bib record and convert it to non-MARC form. (For instructions, see **Converting MARC and Non-MARC Records** on page 270.)

2 Highlight the authority that you want to work with.

3 Do one of these options:

- If you want to delete the authority field, click **Delete** next to the authority.

  Horizon deletes the authority information from the bib record.

- If you want to edit the authority field, click **Edit** next to the authority.

  Horizon lets you edit the authority record.

Important: Changes that you make to an authority record affect every bib record that is attached to that authority record.

4 Make any other changes that you want to make to the authority record.

5 Save your changes.

6 Make any other changes that you want to make to the bib record.

7 Save your changes.

Adding or Editing a Nonauthority Field

To add or edit a nonauthority field

1 Do one of these options:

- Open a static or dynamic non-MARC bib record workform. (For instructions, see See "Opening a Static or Dynamic Workform"**Opening a Static or Dynamic Workform** on page 265.)
- Open an existing non-MARC bib record. (For instructions, see **Finding and Opening an Existing Bib Record** on page 83.)
- Open an existing MARC bib record and convert it to non-MARC form. (For instructions, see **Converting MARC and Non-MARC Records** on page 270.)

2 Position the insertion pointer in a nonauthority field.

3 Enter the appropriate information.

4 Save your changes.

Adding a Field to a Dynamic Record

A dynamic workform lets you add needed fields in addition to editing the information in existing fields. You do this by adding field groups. This allows you to customize records to suit your library's needs. However, you cannot add field groups to a dynamic workform until your system administrator has set them up. (For more

Cataloging Setup Guide.) Also, you cannot add authority fields until you have created an appropriate authority non-MARC workform. (For instructions, see **Creating a Non-MARC Workform** on page 221.)

To add a field to a dynamic record

1 Do one of these options:

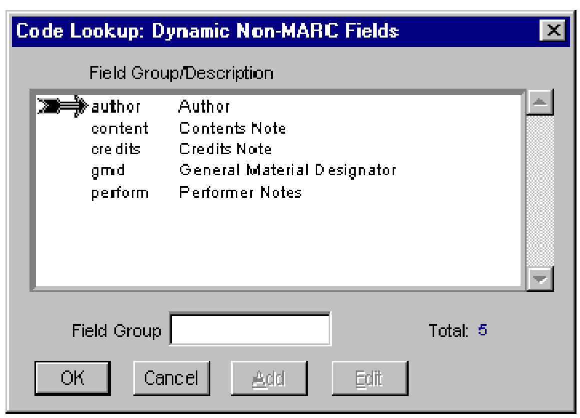
- Open a dynamic non-MARC workform. (For instructions, see **Opening a Static or Dynamic Workform** on page 265.)
- Open an existing MARC bib record and convert it to non-MARC form. (For instructions, see **Converting MARC and Non-MARC Records** on page 270.)
- Open an existing non-MARC record that was converted from a MARC record.
- Open an existing non-MARC record that was built on a dynamic non-MARC workform.

2 Position the insertion pointer in a nonauthority field that is just before or just after where you want the new field.

3 Do one of these options:

- To add a field before the field with the insertion pointer, choose **Edit, Add field before**.
- To add a field after the field with the insertion pointer, choose **Edit, Add field after**.

Horizon displays the Code Lookup Dynamic Non-MARC Fields window:



Note: Check with your system administrator if you are unsure of the fields that your record should contain.

4 Highlight the field that you want to add.

5 Click **OK**.

Horizon adds the field to the record.

6 Enter appropriate information in the field. (For instructions, see **Adding or Editing Information in an Existing Field** on page 266.)

7 Make any other changes that you want to make to the record.

8 Save your changes.

Deleting a Field from a Dynamic Record

You can delete fields from dynamic records.

To delete a field from a dynamic record

1 Do one of these options:

- Open a dynamic non-MARC workform. (For instructions, see **Opening a Static or Dynamic Workform** on page 265.)
- Open an existing MARC bib record and convert it to non-MARC form. (For instructions, see **Converting MARC and Non-MARC Records** on page 270.)
- Open an existing non-MARC record that was converted from a MARC record.
- Open an existing non-MARC record that was built on a dynamic non-MARC workform.

2 Put your insertion pointer in the field that you want to delete.

3 Do one of these options:

- Choose **Edit, Delete Field**.
- If you want to delete an authority field, click **Delete**.

Horizon asks if you want to delete the field.

4 Click **OK**.

Horizon deletes the field from the record.

5 Make any other changes that you want to make to the record.

6 Save your changes.

Converting MARC and Non-MARC Records

You can convert MARC records to non-MARC format. Horizon puts a non-MARC interface over the MARC record. This makes it easy to convert the non-MARC record back to MARC format. However, if you convert a MARC record to a non-MARC format, any control fields (tags 001-008) that may have existed in the MARC bib record are removed. You lose the information that is contained in them. Converting the record back to MARC format does not restore the information.

Only MARC records can be exported. You must convert a non-MARC record to MARC format to export it.

To convert MARC and non-MARC records

1 Do one of these options:

To convert MARC to non-MARC	To convert non-MARC to MARC
1. Open the MARC record that you want to convert to a non-MARC record. (For instructions, see **Finding and Opening an Existing Bib Record** on page 83.) 2. Choose **Marc, Convert to Non-MARC**. Horizon prompts you to verify that you want to make this conversion. 3. Click **Yes**. Horizon displays the record in non-MARC format.	1. Open the non-MARC record that you want to convert to MARC record.(For instructions, see **Finding and Opening an Existing Bib Record** on page 83.) 2. Choose **Marc, Convert to MARC**. Horizon prompts you to verify that you want to make this conversion. 3. Click **Yes**. Horizon displays the record in MARC format.

2 Make any other changes that you want to make to the record.

3 Save your changes.

Appendix A: ALA Hex Sets

This appendix contains ALA hex sets for many special characters.

An ALA hex set is a code for a special character or a keyboard character. In Cataloging, if you enter an ALA hex set when you create a MARC record, the actual character displays. In PAC or staff searching, Horizon displays the special character as the MARC character closest in appearance to it. However, the hex set remains in the record. If you export the record to a program that reads ALA hex sets, the actual character displays.

Special characters listed here may not display in the table as you would see them in Horizon processes (for example, in a MARC record or a search screen).

Special Character	Description	Hex Set
L	Polish L, uppercase	A1
Ø	Scandinavian O, uppercase	A2
D	D with crossbar, uppercase	A3
P	Icelandic thorn, uppercase	A4
Æ	Digraph AE, uppercase	A5
Œ	Digraph OE, uppercase	A6
ʹ	Miagkiy znak	A7
·	Dot in middle of line	A8
b	Musical flat	A9
®	Subscript patent mark	AA
±	Plus or minus	AB
O	O-hook, uppercase	AC
U	U-hook, uppercase	AD
ʼ	Alif	AE
ʻ	Ayn	B0

Special Character	Description	Hex Set
l	Polish l, lowercase	B1
ø	Scandinavian o, lowercase	B2
d	D with crossbar, lowercase	B3
p	Icelandic thorn, lowercase	B4
æ	Digraph ae, lowercase	B5
œ	Digraph oe, lowercase	B6
ʺ	Tverdyi znak	B7
	Turkish i, lowercase	B8
£	British pound	B9
º	Eth	BA
¼	O-hook, lowercase	BC
½	U-hook, lowercase	BD
À	Degree sign	C0
Á	Lowercase script “L”	C1
Â	Phono copyright mark	C2
Ã	Copyright mark	C3
Ä	Musical sharp	C4
Å	Inverted question mark	C5
Æ	Inverted exclamation mark	C6
?	Pseudo question	E0
‘	Grave	E1
´	Acute	E2
ˆ	Circumflex	E3
˜	Tilde	E4
ˉ	Macron	E5

Special Character	Description	Hex Set
	Breve	E6
ç	Superior dot	E7
¨	Umlaut or Dieresis	E8
	Hacek	E9
°	Angstrom or circle above	EA
’	High comma, off center	ED
˝	Double acute	EE
	Candrabindu	EF
ˏ	Cedilla	F0
	Right hook	F1
.	Dot below character	F2
..	Double dot below character	F3
ô	Circle below character	F4
=	Double underscore	F5
_	Underscore	F6
÷	Left hook/tail	F7
	Right cedilla	F8
ù	Upadhmaniya	F9
ú	Double tilde, first half	FA
ûû	Double tilde, second half	FB
’	High comma, centered	FE

Appendix B: SQL Statements

This appendix contains the table names and columns for creating SQL statements. It also contains examples of some SQL statements used for batch exporting and printing.

This appendix contains these sections:

SQL Statements

Refer to these tables and columns when creating SQL statements:

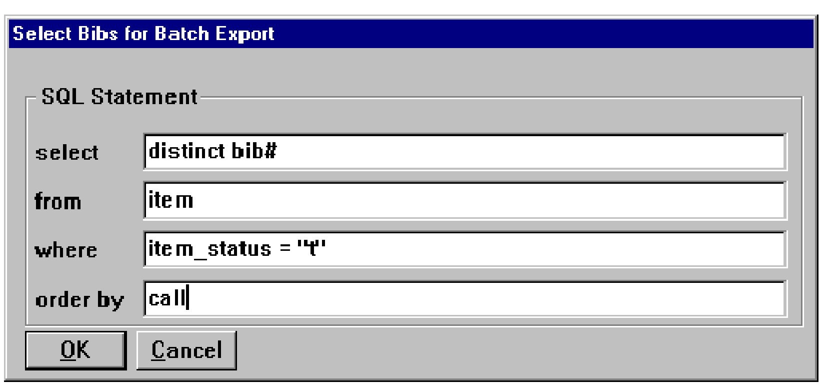
Table name	Columns in table
auth	auth# tag
auth_control	auth# create_date create_time create_user change_date change_time change_user status status_change_date status_change_time status_change_user staff_only_author staff_only_subject staff_only_series
bib	bib# tag

Table name	Columns in table
bib_control	bib# create_date create_time create_user change_date change_time change_user status status_change_date status_change_time status_change_user staff_only
item	bib# location collection call itype item_status source price creation_date last_update_date last_status_update_date

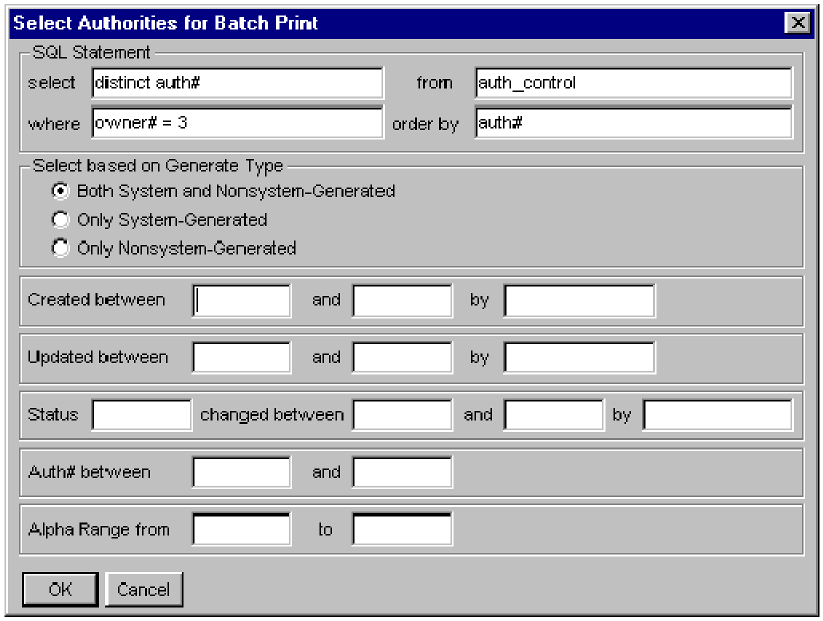
SQL Statement Examples

These examples show some SQL statements that you can use to choose batches of MARC records to export or print.

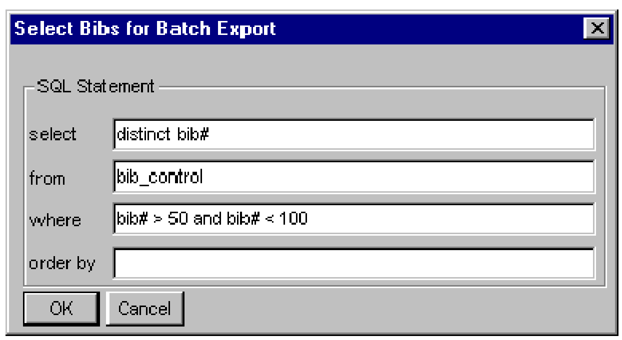
This SQL Statement specifies all bibliographic (bib) records that have item records attached that have an “Uncataloged” status. Horizon displays the bib records from this search in call number order, as indicated by the order by field:



This SQL statement specifies all authority records that have been changed by owner number 3. Horizon displays the bib records from this search in authority number sequence:



This SQL statement specifies all bib records with numbers from 51 to 99:



Appendix C: Glossary

This glossary contains terms that can help you understand the Horizon Cataloging process. (The definitions explain how the terms are used in this guide; they may not explain how the terms are used in other contexts.)

Glossary term	Definition
Authority-controlled tag or heading	Authority information that is defined by the Library of Congress, such as author, subject, and series. Authority headings should remain uniform and consistent in your database.
Authority record	A record that contains standard information defined by Library of Congress, another reputable source, or locally. Horizon creates an authority record when you add a new authority heading to a bib record.
Authority-controlled field	Any tag or subfield that contains authority information. Authority-controlled fields exist in both bib records and authority records. To edit an authority-controlled field in a bib record, edit the corresponding field in the authority record.
Batch change	The ability to change groups of item or copy records attached to one bib record at one time.
Batch creating	The ability to create groups of item records for one bib record at a time. When you batch create item records, you can specify any prefix labels that you want for your records and also the range of item barcodes to be created.
Clipboard	The temporary holding place for data after you cut or copy it.
Codes	A button next to an entry field requiring a predefined code. When you click this button, Horizon displays a list of predefined codes that you can choose from to complete the field.
Compound tag	The combined authority tag created when a uniform title tag is compounded with the co-tag, which provides the author portion of the uniform title.
Control record	Records that provide information about MARC records. When a MARC record is created, Horizon inserts information about this record, such as when it was created and who created it, in a control record. When the MARC record is updated, Horizon inserts information about the update as well. You can view a control record by choosing the Status button on any MARC record.

Glossary term	Definition
Copy record	A record that groups related item records together. Copy records add another “layer” in cataloging records by representing multiple sets of a title. (For example, they can represent how many sets of an encyclopedia that you have—the sets being the copy records, and the volumes being the item records.)
Co-tag	Provides the author portion of the uniform title.
Default owner	The code that determines the person or group that owns a record that is created from a specific workform or from another record. *See Also* **Owner**.
Delimiter	The symbol that separates elements in a statement, command, or data. In Horizon, this is used to mark the beginning of a subfield or the beginning and end of a special code in a MARC record. (For example, Horizon uses the “‡” symbol as a default subfield code, but you can change the delimiter in the Customize Editor.)
Diacritic	A mark near or through a character or characters that indicates how to pronounce a letter, such as an accent mark (for example, “é”).
Dying record	A MARC record that is merged into another MARC record. You may need to copy and paste fields that you want to keep from a dying record into the surviving record before you merge them.
Filing indicator	A character or space between 0 and 9 that contains information about the tag.
Fixed field	Tags that are divided into positions, which contain information in abbreviated form about the record. This information must extend to only the predefined length of the field. Each position accepts not only a certain length of information, but a specific set of values or codes defined by MARC standards.
Global change	The changing of all bib records attached to an authority record to reflect a change in that authority record.
Hex set	An ALA code for a special character. You enter this between two brackets on a MARC record.
Indicator	A space or a digit from 0 to 9. It displays after a tag number and before the first subfield in a MARC record. Indicators can be either filing or nonfiling.
Import scheduling	The ability to specify the date and time when you want Horizon to begin importing records.
Import source	The utility from which you import your MARC records. The import source parameters determines how Horizon handles the records you are importing. Import source parameters include status, staff only index, prefix processing, match points, tag preservation, tag action, and item creation.

Glossary term	Definition
Item creation	Part of an import source. Determines whether item records are created automatically when importing bib records. Your system administrator can specify what tags and subfields to check for item data in imported bib records.
Item record	A record that represents how many copies of a title the library owns. (For example, if your library owns three copies of a title, your library has three item records for that title.) Item records are attached to bib records.
Keyword inheritance	Keywords that are passed on from one linked bib record to another. These inherited keywords affect searches in PAC and staff searching. You can change the way keywords are inherited by changing the search link class filter.
Launcher	The central component of Horizon. Used to organize and open processes and programs in the Horizon workspace. You can customize Launcher settings and display features.
Link From record	The record that you start a bib record link from. You insert a link tag into this record, and it links to the Link To record.
Link tag	The “hook” that links bib records together. The link tag is inserted in the Link From bib record.
Link To record	The record that receives the link. When you insert a link tag into the Link From record and save it, Horizon automatically inserts a reciprocal link tag into the Link To record.
Local tag	A 9XX tag that your library can add to display local or library-specific information, or any MARC tag containing a “9.“
MARC	Machine-Readable Cataloging. Horizon uses MARC standards so you can import MARC records into your Horizon system and export MARC records to other utilities that use MARC.
Match points	Tags or Horizon indexes that are compared between incoming and existing records to determine if any matches (duplicates) exist for the purpose of overlay.
Media display	An attached image, animation, sound, full text file, or other document that displays when you double-click in the Bibliographic Detail window in PAC or staff searching.
Merge	The process of combining two records. Merging helps keep your database clean by removing duplicates. The record that you merge into the other is called the “dying” record. The record that remains in your database is called the “surviving” record.
Navigation bar	The bar or frame from which the main Horizon processes can be started. This bar is customizable and may display differently to different users based on their privileges.

Glossary term	Definition
Nonauthority-controlled field	MARC tags that are not referenced to a MARC authority tag. (For example, the 245 tag contains title information and is nonauthority-controlled.)
Nonfiling indicator	A character between 0 and 9 that specifies how many characters to ignore in the MARC record when creating an alphabetically browsable list.
Overlay	Imported MARC records that replace the existing ones in your catalog when they match.
Owner	Setting that groups records of the same type and can be used by security to limit access to those records. *See Also* **Default owner**.
PAC (Public Access Catalog)	The process that lets your patrons search for titles and authority headings.
Prefix labels	The labels you assign to serial copies (c.) or volumes (v.). You can specify these labels while batch creating item records.
Privilege	The right to access a secured process. A privilege is granted by the system administrator to users and user groups based on need. (For more information, see "Securing Horizon" in the "Security and Preferences" chapter of the *System Administration Guide*.)
Reciprocal link tag	The tag in the Link To bib record that reflects a link. After you insert a link tag in the Link From bib record, Horizon inserts a reciprocal link tag in the Link To bib record. When you double-click on a reciprocal link tag, Horizon opens the Link From bib record.
Repeatable	A tag or subfield that can be duplicated in a record according to MARC standards.
Security groups	Groups that can have specific viewing privileges in PAC or staff searching. Some groups may have privileges to view all titles, other groups may have fewer privileges. You set up security groups in the Edit Borrower window of the Circulation process (then put them in the 911 tag in the bib record). **Note:** A security group set up in the Edit Borrower window is not the same as a security group set up in the Group Manager of the Security Menu.
Staff searching	The process that lets you search for titles and authority headings. You can send these titles and authority headings to the MARC Editor to view their MARC or non-MARC records.
System-generated	Authority records that Horizon creates when no existing authority record matches an authority tag in a bib record. This can happen when you create an authority tag to add to a bib record during a bib record creation or when you import bib records.
See reference	A reference that directs you from a nonstandard form of an authority to a standard form. Also referred to as a "*See From* tracing."

Glossary term	Definition
See Also reference	A reference that directs you from valid authority forms to other valid authorities. Also referred to as a "*See Also From* tracing."
Staff only	A designation for records that limit viewing in PAC to library staff only.
Status	The state of an authority, bib, or item record, or selection list. You can edit bib, authority, and selection list statuses in the MARC record's control record. You can edit item statuses through the Edit Item window.
Summary of holdings	A list of copy records that your library owns. The same window exists in the Serials process.
Surviving record	The record that you keep in your database when you merge two records. You need to cut and paste tags from the dying record into the surviving record before merging them.
Syntax and Validation	Whether a tag or subfield is valid, or compliant with MARC standards, for a record. Also refers to codes that your system administrator has established.
Target	Where Horizon sends the record along with any actions that take place during the export. Horizon does not ship with targets. Your system administrator must set up export targets, or Horizon uses targets already set up in previous versions of Horizon on your system.
Uniform title	An authority record that combines a specific title and its author information into one searchable unit.
Variable field	Tags that can contain any length of information, as specified by the MARC cataloging rules that your library follows.
Workbook	A view that provides tabs for all open windows in the workspace.
Workforms	Templates of bib records that let you create original MARC and non-MARC bib records.
Workspace	The area in which record windows and dialog boxes open inside Horizon.

Index

B

C

D

E

F

K

L

M

N

O

P

Q

R

S

T

U

V

W

Z