Staff PAC
Training Guide
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Welcome to Horizon Public Access Catalog (PAC) training. You use PAC to help you find library items and send them to other Horizon modules to be processed. (For example, you can search for a book in PAC, then send it to Circulation to check it out to a borrower.)

Before you learn about Staff PAC, Chapter 1 covers general information about using computers and Chapter 2 covers an introduction to Horizon. If you already are experienced with computers and with Horizon, you may want to browse through the first two chapters.

Beginning with chapter 3, this document guides you through Horizon Staff PAC in an organized, chronological order, building your skill set as you move from chapter to chapter. This training guide contains these chapters and major sections:

- Chapter 1: General information
- Chapter 2: Introduction to Horizon
- Chapter 3: Searching Overview
- Chapter 4: Keyword searching
- Chapter 5: Alphabetical searching
- Chapter 6: Exact match searching
- Chapter 7: Other search features
- Chapter 8: Bib and item lists
- Chapter 9: Requests and new additions
Using This Training Guide

The windows in this guide reflect the “vanilla” settings that are delivered with most new installations of Horizon. Be aware that the fields, windows, and other screen elements that are referred to and shown in this guide may be different on your system.

Your library and *Dynix* Customer Support can customize some Horizon views to meet the needs of your library. (For example, your library may have added fields or columns to a window, changed the name of a field or window, or changed the default setting for a field.) Additionally, the Horizon interface lets you resize windows. Thus, fields and options may not be located on the same page of the window that this guide indicates.

**CONVENTIONS**
Several conventions are applicable when using this manual. Familiarize yourself with these conventions and terminology to work through this guide and learn about your Horizon system.

**MOUSE CONVENTIONS**
- Click. To place the mouse pointer on an icon, command, or button and quickly press and release the primary (usually the left) button once.
- Double-click. To quickly press and release the primary mouse button twice.
- Right-click. To quickly press and release the secondary button on a multi-button mouse. (The right button is the secondary button—unless you have configured it differently.)
- Drag. To press and hold the primary mouse button while moving the mouse.
- Select. To choose an option from a menu.

**KEYBOARD CONVENTIONS**
- Keys on the keyboard are shown in uppercase, bold characters (for example, “the TAB key”). The keys on your keyboard may not be labelled exactly as they are in this guide.
- When you are instructed to press two or more keys at the same time, the keys are connected by a plus sign. (For example, ALT+H means to hold down ALT and press H.)
- When you are instructed to press two or more keys in sequence, the keys are separated by commas. (For example, ALT, H means to press ALT, then press H.)
- Using shortcut keys, you can quickly access many functions. A shortcut key is the underlined letter in an option (for example, “Create”).
- To use a shortcut key to open a menu, press ALT then press the shortcut key. Once the menu is open, press the shortcut key from the menu option. (For example, press ALT+F to open the File menu. While the File menu is open, press P to print.)
To use a shortcut key to press a button, hold down ALT then press the shortcut key. If a button does not have a shortcut key, press TAB or an arrow key repeatedly until the button is highlighted, then press ENTER.

To use a shortcut key to do Windows functions, (such as cut, copy, paste, print, and save) hold down CTRL then press the shortcut key. (For example, press CTRL+S to save a file.)

- Text or numbers that you are instructed to enter using the keyboard are enclosed in quotation marks (for example, enter “main” in the Location field).

GENERAL CONVENTIONS

- This guide refers to the Horizon software as “Horizon” (for example, “Horizon saves your changes.”) or a specific module name (for example, “Staff PAC displays a bib record.”).
- In step-by-step instructions, the names of menus, buttons, fields, and other options appear in bold typeface (for example, “the OK button” or “the Borrower field”).
- When you are instructed to choose an option from a menu, the menu and menu options are separated by commas. (For example, “choose File, Save” means to choose the File menu, then choose the Save option from the menu.)
- Italic text is general information that you must replace with information that is specific to your system. (For example, the general information sserver//password/username/ddatabase is replaced with something similar to this: /sserv5.5/ pic3c@tz/usallyj/dcataloging.)
- The sample windows in this guide are examples only. The windows displayed by your system will differ depending on the records in your database, the configuration of your views, and if you resize your windows.
- Chapters begin with a special page designed to list the training topics of that chapter.
- Notes and warnings appear framed:

This is an example of a Note or a Warning box.

- The light bulb icon next to a note or warning box indicates special or key information. When you see the light bulb icon, pay particular attention. This “tip” or “hint” will help you use your Horizon system.
• The exclamation point icon next to a note or warning box indicates a warning, or a strong caution. Pay special attention to this information. The information accompanying this icon is essential. You are being warned to avoid certain behaviors, or you are being warned to make sure you carefully follow directions.

At the end of most chapters you will find an Exercises page. This page has been developed so that you can practice the lessons learned in each chapter. The exercises provide practice scenarios, with enough variety in samples to let you practice tasks relevant to your normal workflow.
Windows Basics

This guide assumes a basic knowledge of the Windows 2000, Windows XP, or Windows NT operating systems. At the minimum, you should know how to:

• Start and quit programs, explore your disk, work with files and folders, and switch between open windows.
• 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.
• Customize Windows printer settings.

If you do not know how to do these tasks, refer to the Windows online Help or your Microsoft Windows manual. To display Windows Help, click the Start button, and then click Help. To run the Windows online tutorial, double-click the Help topic called “Tour: Ten minutes to using Windows” in the Help Contents. (This may not be available for all systems.)
Client/Server

Client/server technology has emerged as the database architecture standard. *Dynix* developed the Horizon product as “The Client/Server Solution” for libraries. This chapter will serve as an introduction to core concepts related to client/server architecture.

After completing this chapter, you will be able to:

- List the components of client/server technology.
- Describe features of client/server technology.
- Describe benefits of client/server technology.

**CLIENT/SERVER TERMINOLOGY**

A client represents a machine, usually a PC, that is connected to the network. The client sends requests to a server. The server is a machine that acts as a storage mechanism for the databases and the database management system. The server responds to requests initiated by a client and returns results. Your e-mail is an example of a client sending a request to a server and the server responding.

A client/server database system comprises:

- A client
- A network
- A server

**CLIENT**

A client is a combination of hardware and software that provides:

- **User interfaces.** Windows is an example of a user interface.
- **Application and integrity logic.** An example of this would be the Horizon client software, which the client uses to access the database information.
- **Communication protocol.** This is the information that the client needs to connect via the network to the server, including the “IP” (Internet Protocol) address, TCP/IP, or other communication information.

In short, the client acts as a mechanism to query and to receive information back from the server. A client can be any PC with the correct operating system loaded. Every Horizon workstation in your library represents a single client.

**NETWORK**

The network is the carrier of electronic queries and responses between the client and the server.

**SERVER**

The server is a combination of hardware and software that provides:

- **Server services.** Management of system resources, performance, availability and access
- **Application and integrity logic and data manipulation.** Maintains the integrity of the data.
- **Communication services.** Information necessary for connecting to the client via the network.
- **Storage mechanism for your databases.** Provides for storage of data in database structure.

**CLIENT/SERVER ARCHITECTURE**

The architecture and structure of client/server is illustrated in this diagram:

The client sends the request to the server, which in turn sends a response back to the client via the network.

These are features of client/server architecture:

- Separates the database management system and the database application program functions.
- Centralizes security, data integrity, and high-capacity processing and data storage on the server.
- Distributes user interface execution and design, application development and implementation, and, when appropriate, data integrity controls to the clients.
- Allows different client applications to run against the same data, (Horizon and SQL Advantage, for example).

**MAINFRAME VS. CLIENT/SERVER SYSTEMS**

Mainframe systems:

- Provide the processing for all application programs centrally.
- Perform all the computing tasks from processing keystrokes to implementing program logic.
- Generally provide limited number of concurrent logins and processing speed.

Client/server systems:

- Distribute processing among systems.
- Use PCs for some processing.
• Have a network link systems and transfer screen images and keystrokes.
• Use PCs for user interfaces and networked systems.

**Benefits of Client/Server**
These are some of the benefits of client/server architecture:

• Provides shared processing between client and server; that is, the processing takes place at the server first, then at the client.
• Allows more concurrent logins.
• Provides increased response time.
Chapter 2: Introduction to Horizon

This chapter explains the main Horizon modules, workspace, windows, and menus. This chapter also explains basic Horizon tasks, such as logging in, changing operators, and customizing the display of a List window.

This section explains these topics:

• Horizon modules
• Horizon workspace/logging in to Horizon
• Horizon windows
• Horizon menus
• Horizon tasks
The Launcher and Horizon Processes

The Horizon system is a system of integrated tools, each called a “process.” Processes are grouped together in folders and organized into modules such as PAC (searching), Cataloging, and Circulation. Each process handles a specific library task. For instance, in the Circulation folder there is a Checkout process and a Checkin process for checking items out and in. The Cataloging folder provides other processes including one to create a new bib record from scratch, one to import bib records, and one to create a new workform.

With few exceptions, Horizon processes are integrated. All are accessed from a single user interface called the Launcher. The Launcher has a menu bar that dynamically changes based upon the processes currently open in the Launcher and the process displayed to the front of the Launcher. The Launcher also features a Button Bar and processes can be placed on the button bar so they can be accessed with a single mouse click.

The Navigation Bar provides easy access to processes and the folders they are organized into. Double-clicking on a process in the Navigation Bar opens it onto your Launcher workspace. Your system comes with a default organization structure in the Navigation Bar, which can be customized according to your preferences.

Here are the different parts of the Horizon Launcher:
These are the main Horizon modules and their function:

- **Public Access Catalog (PAC)**. Lets users search for items in the library catalog. Users can search for items by title, author, subject, and so forth. PAC also lets you search for records on your database. (For example, you can search for borrowers in Circulation.)

- **Cataloging**. Lets you set up and maintain a library catalog. Horizon can catalog MARC and non-MARC records. This module is the center of the Horizon system because it maintains all records that are processed through the other modules.

- **Circulation**. Lets your library check items in and out and track borrower profiles.

- **Acquisitions**. Helps you acquire items for your library. You can create, track, and process purchase orders and maintain accurate purchasing records. You can customize Acquisitions to fit your library’s accounting system.

- **Serials**. Lets you manage periodical subscriptions (magazines, newspapers, and journals). You can process newly-arrived periodicals, predict receiving dates for future issues, and generate claims to vendors for late issues. Serials also lets you route specific copies to different people and departments.

Your library may also use additional Horizon modules, such as Reserve Bookroom, Media Scheduling, or Homebound.

**LOGGING INTO HORIZON**

When you log in to Horizon, you choose the server, database, and location you want to access and choose the modules you want to work in. Then you must enter a Horizon user name and password to access the library system. The Horizon user name and password are case sensitive.

Follow these instructions to log in to Horizon:

1. Find the Horizon icon on your desktop and double click on it to launch Horizon.

   A Library System Startup screen like the following appears:
Introduction to Horizon

By default, these fields contain the same settings that were entered for the workstation the last time it was logged on. You will generally need to supply only your password to log in.

2. If necessary, change the information in these fields. (Click the down arrow to the right of the field to display the valid options for each field.) These are the available fields:

   • **Server.** Enter the name of the computer that contains your Horizon database and that runs the SQL server software. (The server software allows client workstations to send and retrieve information from the database.)

   • **Database.** Enter the name of your Horizon database. You may have more than one database. (For example, you may have a training database in addition to your regular database.) The first time you select a server, Horizon prompts you to enter in the Sybase user name and password. After the first login, Horizon will remember the Sybase username and password (and the last-used Horizon user name as well). You will normally have only to enter the Horizon Db user name and password when you log into the Horizon system.

   • **User.** Enter the user name assigned to you for this Horizon database.

   • **User Password.** Enter your Horizon user password.

3. Enter your user ID and password and press **OK.**

   Your user ID determines the views, menu options, and features that you can access. Your password verifies you are an authorized user. A splash screen like the following appears while your system launches Horizon:
Your system displays the Horizon Launcher and you are ready to begin work.

4. To conduct a staff PAC search, press F2 or select New Search from the Navigation Bar.

The system displays another splash screen while your system launches the PAC module and then displays the Main Search window:

![Main Search window](image)

You will learn more about the Main Search window later in this chapter.

**CHANGING OPERATORS AND LOGGING OFF**

When you are finished with your work session, or, if you need to leave your workstation unattended, you should either change operators or log off to safeguard the workstation from unauthorized use. Changing the operator lets the next user login with changed views, menu options, and features—that the next user can access without having to log off Horizon.

Follow these steps to change operators:

1. If necessary, save changes in any open Horizon windows.
2. Select **File, Change User**.
Horizon Staff PAC

Horizon displays the Change User dialog box:

3. Enter the new user ID in the **User** field.
4. Enter the new password in the **Password** field.

To completely log off Horizon follow these steps:

1. If necessary, save changes in any open Horizon windows.
2. Close all open Horizon windows.
   - To close a window, click the **Close** button in the upper-right corner of the window.
3. Close the Launcher.
4. To close the Launcher, choose **File, Exit**, or click the **Close** button in the upper-right corner of the window.
Horizon Windows

There is a basic flow of information when you are conducting a search in Horizon. The first window that you access in the flow of information is the search window. From the search window you generally access either a browse (alphabetical list) window or a list window of matches to your search. From the List window you access a specific bib. From the bib window you can view individual item information.

This section explains these topics:

- Search windows
- List windows
- Bib windows
- Item windows

Search Windows

Horizon displays search windows that let you search for records on a database. This is an example of the main search window:

Search windows share these features:

- **Command mode.** Toggles to an Expert Search window designed to facilitate advanced searches using features like Boolean operators and search command strings.
- **Search Indexes.** Lets you choose the index you want to use for searching on the database.
- **Search prompt.** Briefly explains what types of terms to enter that correspond to the selected search index. It may include examples of search terms.
- **Search field.** Lets you enter the text that you are searching for. (For example, you could enter the name of the author of the book you are looking for.)
• **Command buttons.** Let you do an action (for example, move to another window, add a new entry, or show more information about an item). A disabled button is gray and does not respond when you click it.

**List Windows**

Horizon displays List windows to show the results of your search. You can choose items from the list to see more information about them. This is an example of a List window from the Staff PAC module:

![List Window Example](image)

List windows share these features:

• **List.** Displays your search results.

• **Selector arrow.** Lets you choose items from the list that you want to view, edit, and so forth. You can use the mouse or arrow keys to move the arrow. (You can also choose an item by entering the item number in the Selection field.)

• **Retrieved field.** When your search matches more than 30 records, Horizon displays up to the first 30 records in the list.

• **Resume Button.** (Not shown here.) Click Resume to display additional records in the list, when the search matches more than 30 hits.

• **Display field.** Displays the status of your search (for example “search complete”).

• **Sort button.** Lets you change the order in which the columns display.
**Edit Windows**
Horizon displays Edit windows to let you update your database. You open an Edit window from a List window.

Staff PAC does not display Edit windows.

Here is an example of an Edit Borrower window taken from the Circulation module:

Edit windows share these features:

- **Codes button.** Lets you display a list of options for those fields that accept only predefined values or codes. (You can also display a list of codes by placing your cursor in the field and pressing F12.)
- **Field.** Lets you enter and edit text. If the field accepts only predefined values (codes), Horizon automatically completes the field as you start to enter text with the value that most closely matches it. (For example, if you type “m” in the Location field, Horizon enters “main”.)
- **Group.** Lets you enter multiple values, or group entries, for the same field. (For example, you can enter a home, work, and cell numbers in the phone group for the same borrower.)
- **Check boxes.** Use these to turn an option on or off. An “X” displays in the box if an option is turned on.
- **Save button.** Lets you save your changes to an Edit window. Be sure to save your changes before you close the window.
- **Close button.** Lets you close the Edit window. Be sure to save your changes before you close the window.
CODES
Certain fields in Edit windows accept only predefined values or codes. When you click **Codes**, Horizon displays a list of valid options in the Code Lookup window.

Here is an example of the Code Lookup window from the locations field in the Edit Borrower window previously shown:

- **Code field.** Displays your selection or lets you enter a code from the list. When you start to enter the code, Horizon automatically completes your selection.
- **OK.** Inserts the code into the field on the Edit window.
- **Cancel.** Closes the window without inserting a code in the Edit window.
- **Add.** Lets you add a new code, if you are authorized.
- **Edit.** Lets you edit the selected code, if you are authorized.

GROUPS
A group lets you enter multiple values, or group entries, for the same field. (For example, you can enter a home, work, and mailing address in the Addresses group for the same borrower, or you can enter both shipping and sales tax charges in the Extra Charges group for a statement.) Groups let you work with subrecords in an Edit window without having to open a new window. In effect, this layers the information in one place, like a stack of papers where each sheet of paper has unique information.

A group appears as a collection of fields, buttons, and a drop-down list set apart from the rest of the Edit window by a box that surrounds them. The drop-down list summarizes each group entry. Horizon displays only one entry in the group at a time. Use the drop-down list to display other entries. You can delete group entries or create new ones.
Here is an example of the Addresses group from an Edit Borrower window in the Circulation module:

- **New.** Lets you enter a new group entry. When you choose this option, Horizon displays blank fields.

If you accidentally choose **New** but do not want to add a new entry, choose **Delete** to remove that particular group entry. If you do not delete it, Horizon prompts you when you save the record to fill in the new group’s fields.

- **Delete.** Lets you delete a group entry. Be sure to highlight the group entry you want to delete before you choose this option.

- **Drop-down list.** Displays a summary of each group entry.

- **Fields.** Let you add or edit text.

- **Radio buttons.** Lets you turn an option on or off. You can mark only one radio button at a time. A marked button displays a black dot.
Horizon Menus

The Horizon Launcher menu is integrated and dynamic. Integrated means that a single menu provides you with all needed tools and options. Dynamic means that the options change according to your need, based on the processes you have open and the window currently displayed to the front.

Here is an example of a menu bar:

File Edit View Ctx Item Blocks Tools Window Help

You can access menu options using the mouse or the keyboard. You can also bypass the menu functionality to access options by using shortcut keystrokes.

Choosing Menu Options

You can choose menu options using the mouse or the keyboard:

<table>
<thead>
<tr>
<th>Using the mouse</th>
<th>Using the keyboard</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Click on a menu from the menu bar. The system displays a drop-down list of menu options.</td>
<td></td>
</tr>
<tr>
<td>2 Click on the menu option you want.</td>
<td></td>
</tr>
<tr>
<td>1 Press the ALT key to highlight the menu bar.</td>
<td></td>
</tr>
<tr>
<td>2 Press the underlined letter of the menu you want, or use the arrow keys to move through the menu bar. The system displays a drop-down list of menu options.</td>
<td></td>
</tr>
<tr>
<td>3 Press the underlined letter for the menu option you want.</td>
<td></td>
</tr>
</tbody>
</table>

Using Keystroke Shortcuts

In addition to using the mouse or keyboard to choose menu options, you can use keystrokes to do certain options on an active window. (For example you can press F2 to start a search rather than choosing File, Search from the menu bar.) Horizon lets you use several types of keystroke shortcuts:

- Alt key combinations.
- Ctl key combinations.
- Function keys (F12).
- Other keys, such as Esc, Tab, or Page Down.

Here is a list of basic shortcut keystrokes available in most Horizon modules:

<table>
<thead>
<tr>
<th>To do this</th>
<th>Press this key combination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display the help window.</td>
<td>ALT+H</td>
</tr>
</tbody>
</table>
Here is a list of Windows shortcut keystrokes that may be available in some Horizon modules:

<table>
<thead>
<tr>
<th>To do this</th>
<th>Press this key combination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start a search.</td>
<td>F2</td>
</tr>
<tr>
<td>Exit the Horizon application.</td>
<td>ALT+F4</td>
</tr>
<tr>
<td>Close a window.</td>
<td>ESC</td>
</tr>
<tr>
<td>Move the cursor to the next field.</td>
<td>TAB</td>
</tr>
<tr>
<td>Move the cursor to a previous field.</td>
<td>Shift+TAB</td>
</tr>
<tr>
<td>Move to the next page.</td>
<td>PAGE DOWN</td>
</tr>
<tr>
<td>Move to the previous page.</td>
<td>PAGE UP</td>
</tr>
<tr>
<td>Display the Code Lookup window.</td>
<td>F12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>To do this</th>
<th>Press this key combination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print a record.</td>
<td>CTRL+p</td>
</tr>
<tr>
<td>Copy a record.</td>
<td>CTRL+C</td>
</tr>
<tr>
<td>Save a record.</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Cut a record.</td>
<td>CTRL+x</td>
</tr>
<tr>
<td>Paste a record.</td>
<td>CTRL+v</td>
</tr>
</tbody>
</table>
Horizon Tasks

Several basic tasks are the same for all Horizon modules. You may do these tasks at different times and for different reasons, depending on the module you are using. This section explains how to do these tasks.

**Changing a List Window Display**

Horizon displays a List window each time you do a search or display records from your database. Many List windows in Horizon contain Sort and Display buttons that let you change the display of the window:

In combination with Horizon’s searching, the Sort and Display buttons provide powerful tools to help you access, organize, and display information stored in your database.

The Display button lets you display information related to items in the list that is not currently displayed. The Sort button lets you sort the list by any displayed column.
CHANGING THE COLUMNS IN A LIST WINDOW

If you want to, you can temporarily change the columns that appear in a List window:

You can change the column name.

You can choose the columns that display and the order the columns display in.

You can change the number of characters that display in each column.

This lets you see the information that is the most useful to your current task. (For example, you can display the information in the Item Group Editor.)

You cannot change the columns that display in PAC list windows using the Display button.

Your changes to a List window remain until you exit the module. (To change the display more permanently, see changing Horizon Views information in the Horizon System Administrator Guide.)

Follow these steps to change columns in a list window:

1. Access the List window that contains the columns you want to change.
2. Click **Display** to display a window like this one:

![Display Options Window]

The columns that currently appear in the List window are highlighted in the order they appear on the List window.

3. Highlight the columns you want to display.
   To select or deselect a column, click the column name.

   If the List window is too small or if you have too many columns, the text will wrap to the next line, making the text difficult to read. Because you can resize windows to view more columns, you may want to adjust column widths to display more information on the List window without wrapping.

4. In the **Display properties** group, choose the column whose display properties you want to change, then complete these options to change the display:

   - **Position.** Enter the position you want to assign to the column. (For example, enter “1” to display the column in the left-most position, “2” for the second position from the left, and so on.)
   - **Width.** Enter the width you want to assign the column. (For example, enter “20” to let columns display up to 20 characters of text.)
   - **Label.** Enter the name you want to assign the column.
   - **Right Justify.** Mark this box to right justify the text in the column.
   - **Code.** If your column displays predefined or coded information, such as location, do one of these options:

     - Mark **code** to display the abbreviated name of the code.
       (For example, if you display a location column, Horizon displays “Main” for the Main Library location.)
     - Mark **description** to display a description of the code.
       (For example, if you display a location column, Horizon displays “Main Library”.)
Value. Lets you display parameters or settings in your columns. (For example, you can display the spent event setting for a purchase order in Acquisitions.) If your column is a value, do one of these options:

- Mark short to display a brief description of the value.
- Mark long to display a complete description of the value.

5. Repeat Step 4 for each column you want to change.
6. Click OK.
   The List window shows your changes.

**SELECTING ITEMS FROM A LIST**
You can choose one or more items from a list. This lets you move one or more items from one window to another or from one module to another where you can view, edit, or process the items. (For example, you can choose an item from a list of titles and send it to the Circulation module to check it out.)

This List window shows multiple selected items:

Follow these steps to select an item from a list:

1. Move the mouse or selector arrow to the items you want to select.
   To move the selector arrow using the keyboard, use the arrow keys.
2. Click once or press the space bar on each item you want.
   Horizon highlights each item you select.
3. Repeat steps 1 and 2 until you select all the items you want.
If you double-click on an item, Horizon highlights it and moves it to the next window as if you had clicked the button in the bottom left corner of the List window. You can also select items by entering their numbers in the Selection field (for example, 2-3, 6).

**PRINTING**

In addition to the options for printing standard forms and reports (such as purchase orders and claim letters), you can also print the information you display in most Horizon List windows. (For example, you can print a list of book titles.)

To print the information in a List window, choose **File, Print** or press **CTRL+P**.

You can change print options, if necessary. (For more information, refer to the Windows online Help or your Microsoft Windows manual.)

**SAVING DATA TO A FILE**

You can save the data in most Horizon list and report windows to a file. Saving data to a file lets you send the information electronically (for example, via e-mail), or load the information into other applications. (For example, you might save a list of bibliographies so you can use e-mail to send the list to a remote workstation.)

When you save a list to a file, you can specify how you want Horizon to format the data in the file. (For example, you can choose to use commas to separate columns of data.)

You can open the file where you save the Horizon data using a text editor, such as Notepad.

1. Open the list or report you want to save to a file.
2. Choose **File, Save to File**.
   - Horizon prompts you if you want to save full title or brief title information:
3. Indicate your preference for full or brief title.
   - Horizon displays a Save to File dialog box.
4. Choose the folder where you want to save the file.
5. Enter a name for the file in the **File name** field.
6. Click **Save**.
   - Horizon prompts you to choose the properties you want to use for the file:
Chapter 3: Searching Overview

Staff PAC is the main search engine for Horizon. The Horizon core is the cataloging module, but a flow of information from other modules is accessed through PAC.

When you search for an item in your database, you are actually searching through an index of information. For example, you search through an author index to find authors; you search through a subject index to find items on specific subjects. Your system administrator determines how many indexes you have at your library and how they are labelled.

There are many ways to categorize and search for bibliographic information. This chapter provides you with an overview of conducting searches on the Horizon system. Searching involves three tasks:

- Choosing a search
- Entering a search term
- Finding an item you want
Introduction to Searching

One of a library’s most common needs is to find information quickly. Horizon Searching fills this need by performing searches across the Horizon modules. For example, you can locate a record to edit in Cataloging, an item to check out in Circulation, or a title that you want to order in Acquisitions.

To successfully conduct searches using Horizon, you must be familiar with the windows and lists that Horizon uses to display information.

CHOOSING A SEARCH
Horizon provides your library with flexibility in setting up the search indexes you use for searching databases. Your system administrator can answer any questions you might have about the search indexes that are available on your PAC workstation.

The first step in finding the item you need is choosing a search. You choose a different kind of search depending on the information you know when you start. The most common searches are:

- **Typical Keyword.** Searches for items by information such as title, contents, subject, author, and series.
- **Boolean Keyword.** Uses special search symbols to expand or narrow searches to fit your needs.
- **Alphabetical Authority/Browse.** Searches for records alphabetically by title, author, subject, or series.
- **Exact match.** Searches for specific records by supplying unique information such as ISBN, ISSN, volume, and call number.

These searches are explained in detail in the next chapter. When you select New Search or press F2 Horizon displays the Main Search window:
ENTERING A SEARCH TERM

After you select the type of search you want to make, you enter a specific search term. A search term is the word or words you want to search for. If you choose a keyword search, the system searches for the terms exactly as you enter them. If you choose an alphabetical search, the system accesses a Browse list, placing you at the closest entry in spelling to the term.

Here is a sample search window. This is a General Keyword search and the search term being entered is “computer”:

The search window contains these parts:

- **Search index.** Displays a list of search options. Horizon searches the specific index for the term or terms you enter into the Search for entry box. You can select a search index by clicking on an entry in the displayed list, or by pressing the up and down arrow keys to highlight the desired index.

- **Search prompt.** Briefly explains what type of term or terms to enter in the Search for entry box and corresponds with the selected search index. Click on Example to see more detailed examples of the search index.

GENERAL SEARCH GUIDELINES

When you enter a search term, such as a title or a keyword subject, remember these guidelines:

- **Capitalization.** You can enter search requests in either uppercase or lowercase characters. The system makes no distinction between the two.

- **Hyphenation.** Horizon searches hyphenated words as separate words. Therefore, you can enter hyphenated terms (such as “cease-fire” or “trade-in”) with or without a hyphen. The system makes no distinction between terms such as “trade-in” and “trade in.” If you do not type the hyphen, however, be sure to enter the term as two words (“trade in”, not “tradein”).

- **Punctuation.** The system ignores punctuation marks, including apostrophes, commas, periods, accent marks, multiple spaces, and so forth. The inclusion or exclusion of punctuation does not affect the search. However, certain punctuation marks (such as parentheses and caret symbols), can be used as Boolean operators to limit or expand searches.
Finding the Item You Want

After you enter a search term, you move through a series of screens to find the items you want. This series varies depending on the search you choose. In this example, we conduct a General Keyword search using the search term “computer.” The system displays a Bib List window:

If the designated title is the one you want, click **Show Detail** at the bottom of the screen. (You can also press the **Enter** key with the item selected.) The Bibliographic Detail screen appears:

This screen is also called the full bib display and provides complete bibliographic information on the chosen item. You can view any of the other titles that appear on the Search Results screen. Just click on the desired title or use the arrow keys to select a title, and then press **Enter** (or double-click on the desired title).
This window provides information on the item level, but does not give specific information on the copy level (if there is a copy record). Click on **Show Copies** to view copy-specific information for the selected item.
Chapter 4: Keyword Searching

There are many ways to search for information, depending on the data you have available to you when you conduct your search. In this chapter you’ll become familiar with the basic search types and how to conduct them. You will also familiarize yourself with search windows and learn to use important searching features so you can access relevant bibliographic information.

When your Horizon system is installed, your system administrator finalizes which indexes are built. The indexes on your system determine the types of searching that you have available to you. Be aware that you can customize the searches that display in your Staff PAC.

In this chapter you will learn about these search topics:

- Simple keyword searching
- Boolean keyword searching
Keyword Searching

Keyword searching finds items that have a specific word or words in the title, contents, subject, or series. You typically use a keyword search to find general topics when you don’t have any specific bibliographic information.

For example, if you want to find items with titles that contain the words “computer hardware,” you can select a Title Keyword search and enter “computer hardware” in the Search For entry box. You can find items about computer hardware, even when titles may not contain those words, by selecting the Subject Keyword search and entering “computer hardware”.

Horizon does not locate misspellings or variations of a search word. If no matches are found, check the spelling of the keyword or enter a truncated version of the keyword. You can search for one keyword or many, a whole keyword or part of one. Be aware that very common terms—terms that appear frequently like “the” or “and”—are often added to a Stop Word list by your library. Horizon does not search for terms on the Stop Word list.

There are different types of keyword searches, ranging from the very simple to the more complex:

- **Single-term search.** This is the simplest form of keyword search. You enter a single keyword.

- **Multiple-term (or Boolean) search.** This search lets you locate records, such as titles, authors, or subjects, that contain two or more terms. Multiple-term searches can consist of several keywords as well as use Boolean operators.

- **Truncated search.** This search lets you enter a truncated form of a word.

When a keyword search results in a large number of “hits,” the system displays a limited number of bibliographic records. By selecting Resume, Horizon displays additional matching records. The progression is as follows:

- The first 30
- The first 300
- The first 600
- And so forth, in increments of 300

**Viewing Keywords for Keyword Searches**

As records are added to your database, relevant keywords are indexed in a word table. Each word is assigned a corresponding bib number, as well as the type of word it is (for example, title, subject, series, author, and so forth). A word table, then, is a list of indexed keywords, (excluding Stop Words).

Any time you are unsure what words to use in a keyword search, you can access the keyword list for that index and select one.
Follow these steps to view keywords for keyword searches:

1. Choose New Search from the File menu to open the Search window.
2. Select a keyword search option and click on **View Keywords**.

   The system displays a keyword dialog box:

   ![Keyword Dialog Box Image]

   ![Keyword List Image]

   The number of matches displayed is for this specific index only. The same search on another index will likely yield a different number of matches. For example, a Title Keyword search on the term "school" might yield 46 matches, while a Subject Keyword search on the same term might yield 17 matches.

3. Type a whole or partial word in the dialog box and click **OK**.

   An alphabetical list of keywords appears, displaying the number of matches Horizon found in this index.

4. Choose the Keyword you want from the list to select it and click **OK**.

   The Search window returns and the keyword appears in the Search for entry box:
Keyword Searching
**Boolean Keyword Searching**

When you begin a new search, Horizon displays the Standard Mode window, which is the system default:

In the top right-hand corner of the Main Search screen is a **Command Mode** button. This button is a toggle between Standard Mode and Command Mode. The searches you conduct in standard mode are made against the selected index. You can narrow or broaden your search using Boolean operators—just remember your search is against the single index you’ve selected.

The Command Mode search screen looks like this:
The words “Expert Search” appear in the Title Bar at the top of the Command Mode screen. Expert Search is an option you can define as a part of a PAC flavor. Command Mode opens more complex search strings in your searching. The search strings you use here can be very powerful in defining your search.

**CONDUCTING A MULTIPLE-TERM KEYWORD SEARCH ON A SINGLE INDEX**

You can enter multiple terms to either narrow or broaden a search. For example, “and” is used to narrow a search, whereas “or” broadens a search. With Horizon, you can enter “and” or enter a space in place of “and,” (which implies “and”). You must enter all other operators, such as “or”, or “not”.

<table>
<thead>
<tr>
<th>To do this</th>
<th>Use this operator</th>
</tr>
</thead>
<tbody>
<tr>
<td>To narrow a search (to find both keywords in both indexes)</td>
<td>And</td>
</tr>
<tr>
<td>For example, if you enter &quot;symphony orchestra&quot;, Horizon locates records</td>
<td></td>
</tr>
<tr>
<td>that contain both words.</td>
<td></td>
</tr>
<tr>
<td>To broaden a search (to find either keyword in either index)</td>
<td>Or</td>
</tr>
<tr>
<td>For example, if you enter &quot;symphony or orchestra&quot;, Horizon locates records</td>
<td></td>
</tr>
<tr>
<td>that contain either word.</td>
<td></td>
</tr>
<tr>
<td>To narrow a search (to find the first keyword in either index,</td>
<td>Not</td>
</tr>
<tr>
<td>but in any combination with the second keyword).</td>
<td></td>
</tr>
</tbody>
</table>

**CONDUCTING A MULTIPLE-TERM KEYWORD SEARCH ON MULTIPLE INDEXES**

Follow these steps to conduct a multiple-term keyword search on multiple indexes:

1. Click on the **Command Mode** button.
2. Double click on a search index from the list to place a text string for that search in the Search Command window:
A caret symbol appears before and after the abbreviation for the search you selected, for example “<tkw:>” for Title Keyword. The blinking cursor symbol appears in front of the last caret.

3. Enter the first search term after the search abbreviation, just before the second caret, for example, enter “history.”

4. Select a Boolean operator from the available buttons. For example, click And.

5. Double click on another search index from the list to place a text string for that search in the Search Command window:

![Expert Search Window](image)

Again, a caret symbol appears before and after the abbreviation for the search you selected, for example “<subjkw:>” for Subject Keyword. The blinking cursor symbol appears in front of the last caret.

6. Enter another search term. For example, you can enter a Subject Keyword search on the word “medicine.” Be sure your second entry follows the second index abbreviation (in this example, Subject Keyword). If your entry follows the title keyword entry, you will be conducting a Boolean search on the one index only.

7. Press OK.

Horizon conducts a Boolean search trying to match items in the Title Keyword index that have “History” in the Title and the term “Medicine” in the Subject Keyword index.

Horizon displays the results in a screen similar to this one:
CONDUCTING A TRUNCATED KEYWORD SEARCH

The procedure for a truncated keyword search is the same as other types of keyword searches. However, a truncated keyword search lets you broaden your search by replacing one or more characters in a search term with a truncation symbol (an asterisk).

You can use an asterisk to truncate one or more letters in a keyword search. For example, by entering the term “manage*” you could locate records that contain variations of the root “manage”, such as “manager,” “management,” and “managerial.” You can also use the asterisk in the middle of a word to substitute for one or more letters.

You can truncate words to two or more characters; however, the shorter the truncated term, the more words Horizon locates. Avoid terms such as “co*”, “man*”, “in*”, or “sta*” because they will produce lengthy lists of matches.

CONDUCTING A CHARACTER REPLACEMENT SEARCH

You can use the question mark (?) in a search string to replace one letter. For example, you can enter “compu?ter?” to find records that contain either “computer” or “computers.” You can use a question mark in place of a single letter in the middle of a word as well. For example, you can enter “wom?n" to locate records that contain the terms “woman” or “women.”

When you use Command Mode for Searching, Horizon will remain in Command Mode for the duration of the current session, or until you click the Standard Mode button to return to Standard Mode Searching.
Exercises
You use alphabetical authority searches when you want to know which authorities are being used for database management purposes or by users wishing to know what is available by a particular author, classed in a particular subject or series.

- Alphabetical Searches
- Searching on cross references
Alphabetical Searches

Alphabetical searches display browse lists of information. An alphabetical authority search (author, subject, or series) displays information from authority tables. An alphabetical title search or a music title browse displays information from bibliographic tables.

The system displays the portion of the browse list that most closely matches your search term. As the name “browse list” suggests, you can use the scroll bar on the right side of the list window to scroll up or down through the list.

This is a browse list for an alphabetical authority search on series:

From this window you can access the Bibliographic Detail window.

**CONDUCTING AN ALPHABETICAL SEARCH**

Follow these steps to conduct an alphabetical authority search on *author*:

1. Select the Author Browse (or equivalent) search in the Main Search window and enter a search term in the Search for field.
   
The system displays the author browse list:
2. Double click on the desired entry or click **Show Titles** to view the Titles List window:

![Authors: Oates](image1)

This window displays titles for the selected author.

3. Double click on the desired entry or click **Show Detail** to view the Bib Detail window:

![Search form: Oates, Joyce Carol, 1938-](image2)
This window gives information on the item level, but does not give specific information on the copy level. There is one more screen to view if you desire specific copy information.

4. Double click on **Show Copies** to view the Items window:

This window displays a list of copies for a selected title. Information displayed includes call number, status, and location. If no copies are available, you can make a request.
SEARCHING ON CROSS REFERENCES

See references and See Also references help you find additional information that you might not find with a keyword search. See references direct you from a term or name under which no entries are listed to a valid term or name under which entries are listed. See Also references direct you from a valid term or name under which entries are listed to another term or name with similar or additional entries.

If you select a See Also reference, you can return to the original heading by selecting the related term and choosing Reposition to. However, you cannot return to the original term if you selected a See reference, since the original term was not valid.

Follow these steps to view a See or a See Also reference:

1. Choose File, New Search (or press F2) to open a new search.
2. Conduct a subject alphabetical authority search. In this example we search for Butch Cassidy:

The system displays a screen like the following:
Notice that Butch Cassidy lists a *See Also* reference: Sundance Kid.

3. Use the down arrow to select the reference. Notice that the **Reposition to** button becomes active.

4. Either double click on the reference, or (with the reference selected), click on the **Reposition to** button.

The system takes you to that entry in the list:
Chapter 6: Exact Match Searching

Basic Searching includes a number of features indispensable to searching your database for records. This section provides a description of these basic features and explains their functionality:

- Performing an ISBN search
- Performing an LCCN search
- Browsing with partial information
Exact Match Searching

Exact match searching refers to those occasions when you have very specific information (like an ISBN or LCCN number) and you want to find one title corresponding to that number.

PERFORMING AN ISBN SEARCH

Follow these steps to conduct an ISBN search:

1. Choose New Search from the File menu to open the Search menu.
2. Conduct an exact match search by selecting the ISBN exact search option and entering an ISBN number as shown in the next screen:

Horizon displays the Bibliographic Detail screen:
PERFORMING AN LCCN SEARCH

Follow these steps to conduct an LCCN search:

1. Choose **New Search** from the File menu to open the Search menu.
2. Conduct an exact match search by selecting the LCCN search option and entering an ISBN number as shown in the next screen:

Horizon displays the Bibliographic Detail screen:
BROWSING WITH PARTIAL INFORMATION

Sometimes you are looking for a specific item but you have only partial information to work with, for example, the first digits of an ISBN. In these instances, you can perform a truncated search to access a browse list.

Follow these steps to perform an exact match search when you have only partial information:

1. Choose **New Search** from the File menu to open the Search menu.
2. Conduct an exact match search by selecting the ISBN/ISSN Browse option.
3. Enter the first digits of your ISBN number, followed by an asterisk (*). For example, enter “902*”.
4. Double click on a title to display bibliographic information, or click on it to highlight it and choose **Show Detail**.
Chapter 7: Other Search Features

Basic Searching includes a number of features indispensable to searching your database for records. This section provides a description of these basic features and explains their functionality:

- Viewing related works
- Viewing an alphabetical list from related works
- Viewing a call number list from related works
- Conducting a previous search
- Restricting a search
Viewing Related Works

PAC can show you items that are related to the item you just found. These items can be related by author, subject, series, or linked bibs. You access related works in the Bibliographic Detail window.

Follow these steps to view related works:

1. Choose New Search from the File menu to open the Search window.
2. Search for a title.
3. Display the title in the Bibliographic Detail window:

4. Click on Related Works.
   Horizon displays a dialog box that lists the categories of related works for the title. If no related works exist for a certain category, Horizon does not display that category in the list.

5. Select the related works category you want in the dialog box.
In the example above, **Subjects** was chosen. (A shortcut to steps 4 and 5 is to double click on the author, subject, or series field as it is displayed in the Bibliographic Detail window.)

6. Choose **OK**.

PAC displays one of these windows:

- **Related works.** The Related Works window lists entries related to the original title by the category you chose. You can select any option available from these windows and continue your search.
- **Titles.** The Titles window displays a list of titles that are related to your original search title.
- **Bibliographic Detail.** The Bibliographic Detail window displays a bib record of a title that is related to your original search title.

If you double click on an underlined item other than author, subject, or series in the Bibliographic Detail window, the Bibliographic Detail window for that item appears.
Viewing an Alpha List

When you view Related Works from a bibliographic record, you select the authority-related category that you want to view. Once you have selected the author, subject, or series, Horizon activates the To Alpha List button on the Related Works window. The To Alpha List button displays an alphabetical list of authority-controlled fields (author, subject, or series depending on your entry).

1. Start a new search and advance to the Bibliographic Detail window.
   The Related Works button is located on this window:

2. Choose Related Works.
   The Related Works dialog box appears:

   ![Related Works dialog box]

   The system prompts you to choose a related works category. This is an authority-controlled category (author, subject, series). The Related Works dialog box displays only the categories available to you.

3. Choose a category and click OK. (In this example we have selected the Subjects category.)

   The system displays the Related Works window for the Subjects category:
The **To Alpha List** button appears on the Related Works window.

4. Choose **To Alpha List**.

The system displays an alpha list for the selected category (in this example, the subjects category):

5. Choose **Show Titles** to view bibliographic information, or choose **Cancel** to return to the Main Search window.
Viewing a Call Number List

The call number list gives you a way to view items that are shelved near the record you searched, and which therefore contain similar information. You can access a call number list from the Bibliographic Detail window or from the Copies window.

1. Start a new search and advance to the Bibliographic Detail window.
   The Call# List button is located on this window:

2. Choose To Call # List.
   The Call Number List window appears:
The selection arrow identifies the place in the list occupied by the bib record you just accessed. Use the up or down arrows (or click in the scroll bar) to scroll up or down through the list.

3. Select an item in the list and choose Show Detail to view its bibliographic record. You can select multiple items by clicking on them. Horizon highlights selected items. If you select more than one item in the list, the Next and Prev. Title buttons on the Bibliographic Detail window becomes active. Choose Next to view the next title you selected; choose Prev. Title to view the previous title you viewed.

4. Choose Show Copies to view item information. Choose Cancel to exit the Bibliographic Detail screen.
Conducting a Previous Search

Horizon saves search strings and search indexes used during a current PAC session. Closing the PAC module clears all previous search strings.

1. Choose New Search from the File menu to open the search window.
   The Previous Search dialog box appears. Notice that the dialog box not only displays previous search strings but the search option used for a search as well.

3. Select a previous search string.
4. Choose OK.
   The Search window returns. Horizon highlights the search option originally used and enters the search string in the Search for entry box:

5. Select a different search option, if you wish.
6. Choose OK.
   Horizon runs your search request.
Restricting a Search

Horizon lets you narrow the types and locations of records you want to search for. For example, if you are interested only in nonfiction titles that are currently checked in, you would restrict your search to those two criteria.

You can restrict a search either before you search or during your search. The Titles List window displays only those items that match your restrictions. If your search is not a title search, continue to the Titles List window to display any matches.

Restricted entries in subject keyword, author keyword, and alphabetical searches do not appear until you display the Titles List for a selected heading. Title Alphabetical searches display gray entries that do not match your restrictions.

You can restrict a search by one or more of these criteria:

- Collection
- Location
- Item status
- Item type

You specify restriction parameters in the Restrict window. This window opens when you choose either the Restrict button in the Search window or the Restrict command from the File menu.

Restrictions that you apply to a search remain in effect for the current session unless you manually reset Restrictions functionality using the Reset button in the Restrict Title Display window.

The two columns in the Restrict window let you select the criteria to restrict records to. Users can change restriction parameters at any point during a search. The library sets up a default set of restriction parameters that Horizon reactivates when you choose Reset.

Follow these steps to restrict a search:

1. Choose New Search from the File menu to open the Search menu.
2. Choose Restrict in the Search window.
   The Restrict Title Display window appears.
3. Select the search restriction criteria (in the left-hand window). For example, if you want to find titles that are checked in, select "Items Checked in."

4. Select the location of the records you want to search (in the right-hand window). For example, if you want to locate titles at Main and North locations, you would highlight them:

5. Choose OK to confirm the restriction parameters. Horizon redispays the Search window:
Notice that Horizon displays your search restriction above the **Search for** entry box.

6. Press **OK** to conduct the search.
Chapter 8: Bib and Item Lists

Staff PAC searching includes a number of features indispensable to searching your database for records. This section provides a description of these basic features and explains their functionality:

- Sorting a list
- Search limiting on title lists
- Creating a bibliography/bookmarking
- Printing lists and bibliographies
- Save to file (File menu)
Sorting a List

You can sort a list from the List window if you want to view the list in a particular order (for example, by publication date or by title).

You can sort numbered lists only. You cannot sort lists for alphabetical searches.

Follow these steps to sort a list:

1. Choose **New Search** from the File menu to open the Search menu.
2. Conduct a subject keyword search on the term “chamber music.”
   The system displays the browse list window:

3. At the browse list window, select “chamber music” and click **Show Titles**.
   Horizon displays a list window:
4. At the List window, choose **Sort**.
   The Choose Sort Columns window appears:

   The first column listed (Title) is the primary sort column. You simply click on an item in the sort column dialog box to move it to the top of the window.

5. Select the field to sort by in the Primary sort column.
6. Select the appropriate field in the Secondary sort column, if desired.
7. If desired, select the Descending checkbox to sort the list from last to first.
8. Choose **OK**.
   The List window redisplay, reflecting the resorted items:
The sort remains in effect only while you are in this window. Once you close out of the window, the default sort fields return.
Limiting a Search

Horizon lets you further limit search results from a titles list. You cannot limit alphabetical lists or other closed lists, such as subjects or authors. This section explains how to limit a titles list. Here is a description of the Search Limit window. The procedure for limiting a search follows this description.

Search Limit Window

The Search Limit window has three separate elements that narrow a search: field description, limiting operator, and limiting value

- **Field Description.** Specifies the field or criterion you want to limit a search by. The field description is designated by a bibliographic record field name.
- **Limiting Operator.** Specifies the relationship between the field description and the limit value. (See the following table for examples of valid operators.)
- **Limiting Value.** Specifies the criteria against which the data in the field is compared. For example, if you limit a list to items published after 1990, “1990” is the limiting value in that search. You can truncate a limiting value if you select “contains” as the limiting operator.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Name</th>
<th>Example of Valid Limiting Operator</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>Equal to</td>
<td>You may want to limit a list to items with a publication date of 1995 (publication date = 1995) or with an author named Williams (author = Williams).</td>
</tr>
<tr>
<td>&lt;</td>
<td>Less than</td>
<td>You may want to search for items with a publication date before 1988 (publication date &lt; 1988).</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than</td>
<td>You may want to search for items with a publication date after 1988 (publication date &gt; 1988) or with an author who comes after Turner alphabetically (author &gt; Turner).</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less than or equal to</td>
<td>You may want to limit a list to items with a publication date before or during 1988 (publication date &lt;= 1988).</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than or equal to</td>
<td>You may want to limit a list to items with an author who comes after Webb alphabetically (author &gt;= Webb).</td>
</tr>
<tr>
<td>#</td>
<td>Not equal to</td>
<td>You may want to limit a list to items with publication dates before or after but not including 1988 (publication date # 1988).</td>
</tr>
<tr>
<td>contains</td>
<td></td>
<td>You may want to limit a list to items with subject tags that contain a specified term like &quot;computers.&quot;</td>
</tr>
<tr>
<td>does not contain</td>
<td></td>
<td>You may want to limit a list to items with subject tags that do not contain &quot;computers.&quot;</td>
</tr>
</tbody>
</table>

Limiting a Titles List

Follow these steps to limit a titles list:
1. Choose **New Search** from the File menu to open the Search menu.

2. Conduct a title keyword search.
   
   In this example we conduct a Title Keyword search on the term "red":

   ![Search Menu](Image)

   The system displays the Titles List window:

   ![Titles List](Image)

   3. Choose **Limit** on the Titles List window.
      
      The Search Limit window appears:

   ![Search Limit](Image)
4. Select the field you want to limit the list by.
5. Select the radio button next to the desired limiting operator.
6. Enter the text or value you want to limit by in the Limit Text entry box.
   In the previous example we limited the search to publication dates greater than or equal to the year 1972.
7. Choose OK or press Enter.
   A dialog box displays the total number of entries in the list and the number of entries that match the limit criteria.
   After Horizon checks the entire list, the List window returns and displays only those entries that matched the criteria. You can select any options from this window and resume your search. In our example, a single title remains:
8. Click **Show Detail** to display the Bibliographic Detail window:

![Bibliographic Detail window](image)

9. Click **Show Copies** to display the Copies window.

![Copies window](image)

The Copies window displays copy specific information, or item specific information when no copy record exists. When at a copy window, you can see item-specific information by double clicking on the desired item.
Creating a Bibliography/Bookmarking

Saving a list of titles or items to print is called “bookmarking.” Bookmarked titles are stored on a Saved Items list or a Saved Bibs list. There is no limit to the number of saved records that can be stored on a list.

Once you have completed the bookmark list, you can print it or save it to a file. You can save either bibliographic or item records depending on the type of information you want to save.

- Saving a bibliographic record saves information such as title, author, publication place, publication date, and so forth. In general, information saved at the bibliographic level is title (not item) specific.
- Saving an item record saves item-level information. In addition to bibliographic information like title and author, item-level information includes call number, status, location, and collection.

Be aware that you can bookmark records from Titles List, Bib Display, and Copy (m) windows.

Bookmarking a Record

Follow these steps to bookmark a record:

1. Conduct a search until you access the record you desire (in any one of the applicable searching windows).
2. Select the desired record or records.
3. Choose Add Bookmark Entry from the Bookmarks menu.
   A dialog box appears:

   ![Bookmark dialog box]

   4. Select the type of record information that you want to save, title (bibliographic) or item.
5. Choose OK or press Enter.

The system displays a message verifying that the record was saved to a list.

6. Press OK to close the message.

The bookmark list is available during the current session. When you log out of your current session, Horizon deletes the list.

Many libraries let borrowers print bookmarks or save the list to a file (File–Save to File). You can print brief or full title (or item) information. Likewise, you can save brief or full title (or item) information.

**VIEWING AND PRINTING A BOOKMARK LIST**

1. Choose View Marked Titles to see a list of titles or choose View Marked Items to see a list of items.

The system opens the list for the type of records you selected.

2. Choose Print from the File menu.
**DELETING A BOOKMARK ENTRY**

1. From the Bookmarks menu, choose View Marked Titles to see a list of titles or choose View Marked Items to see a list of copies.
   The system opens the list for the type of records you selected.
2. Select one or more entries to delete.
3. Choose Remove Bookmark Entry from the Bookmarks menu.
   A message appears that verifies the deletion.

4. Choose **OK** or press **Enter**.
Save to File

You can save bib or item records to a file on your computer. Generally, you would do this to archive the file so you could access it later to view or print.

Follow these steps to save a list or bib to a computer file:

1. Conduct a search until you access the record you desire (in any one of the applicable searching windows). In this example we perform a general keyword search on the term “medicine:"

The system displays a Title List window:
2. Double click on the desired record (or use the arrow keys to move up or down through the list until the selection arrow is pointing at the desired record and then click **Show Details**.

The system displays the Bibliographic Detail window:

![Bibliographic Detail Window]

3. To save the bibliographic information to a computer file, select **File, Export Record(s)**:

The system displays a dialog box similar to this one, letting you navigate to the location on your computer (or network) where you want to store the file:

![Save to a File Dialog Box]

4. Navigate to the location (folder) in which you are going to save the file.
5. Give the file an identifying name in the File name field and click **Save**.

The Save to a File dialog box disappears.
6. Click **Cancel** until you return to the Main Search window.
Chapter 9: Requests and New Additions

Horizon lets you request items that are checked out or unavailable. When more than one person has placed a request on a particular title, the name of each person is placed in a request queue (waiting list) in the order of their submittal. When a requested item is returned, the library notifies the first person on the list that the item is available.

- Making a request
- Viewing a list of titles requested by an individual
- Viewing a list of requesters for a particular title
- Reordering the names in the Holds Queue
- Deleting a request
- Viewing item detail status
Horizon Staff PAC

Making a Request

Depending on your library’s policy, borrowers may be able to request either the first available copy of an item or a specific copy. Your library uses current policy to assign a borrower his or her notification method—by mail, e-mail, or phone.

A request can be submitted from a Titles List, Bibliographic Detail, or Copies window. In this training we show the process from the Bib Detail window.

Starting with version 7.3, you must have Horizon Information Portal (HIP) installed and running to make requests on the Horizon system.

Follow these steps to make a request:

1. Conduct a search for the title or item you want to request and display it in the Titles List window:

2. Choose the title you want to request if you are working with a list."
The system displays the Bibliographic Detail window:

![Bibliographic Detail window](image)

The current status of the title is displayed at the top of the Bib Detail window. Note that in this example, the title is checked in.

3. Select Make Request from the Request Menu (or press F5):

![Request Menu](image)

The system displays the Hold Request window:
The Hold Request window displays the current borrower and the item’s title in the upper portion of the screen. In the lower portion of the window are these fields:

- **Pickup Location.** The item’s default pickup location.
- **Codes.** A list of possible pickup locations. If your circulation policies permit, you can select a pickup location from those choices on the list.
- **Comment.** A free-text field. Here you can enter a comment such as “Please make sure the CD-ROM is present inside the front cover.”
- **Notice.** The method of notification once the item is available.
- **Expires.** The request’s expiration date.

4. Choose **Request** once you have entered the appropriate information on the Hold Request window.

The system displays a dialog box, verifying you have successfully placed a request for this title:

5. Choose **OK**.

The List window redisplay, reflecting the resorted items:
VIEWING A LIST OF TITLES REQUESTED BY AN INDIVIDUAL

Follow these steps to view a list of titles requested by an individual:

1. Conduct a search for the title or item you want to request and display it in the Titles List window:

   ![Titles List Window]

   - Selection: 4
   - Retrieved: 0 of 9
   - Search complete

2. Select a bib from the list.
   The system displays the Bibliographic Detail window:

   ![Bibliographic Detail Window]
3. Choose View Borrower Request List from the Navigation Bar.

The Borrower Search window appears:

4. Choose Borrower Last Name Alphabetical and enter the first few letters of the borrower’s last name in the Search for box, then click OK to search for that borrower.

The system displays a Borrower List window, an alphabetical listing of borrowers, with the cursor at that portion of the list that most closely matches your entry.
5. Choose a borrower and click **OK**.

The system displays the Borrower Request List:

The Borrower Request List is a list of unavailable titles that a particular borrower has entered requests for. In this example, the borrower has placed two requests.

**VIEWING A LIST OF REQUESTERS FOR A PARTICULAR TITLE**

Follow these steps to view a list of requesters for a title:

1. Conduct a search for the title or item you want to request and display it in the Titles List window:
2. Select a bib from the list.
   The system displays the Bibliographic Detail window:

   ![Bibliographic Detail Window]

3. Choose View Title Request List from the Request menu (or choose Ctrl+F5).

   ![Request Menu]

   The Item Request Queue window appears:
The borrowers in this list appear in the order the requests were made. You can click Borrower Requests to view a list of requests for the selected borrower. You can also reorder the queue, which is explained next.

**Reordering the Request Queue**

You can reorder the request queue, which lets you move a borrower from a position lower in the queue to a position higher in the queue. You give a person a different position in the queue by selecting that person and moving them to the desired position in the queue.

You reorder requests from the Item Request Queue. You access the item request queue from the Request Menu, View Title Request List. The Request menu is available from the Search List screen, the Bib Detail screen, or the Copies (Items) screen.

Follow these steps to reorder the request queue:

1. Conduct a search for the title or item you want to request and display it in the Bib Detail window:
2. From the Request menu, select View Title Request List as shown below:

The system displays the requests currently made against the selected title:

3. Select a borrower from the list.
   The system displays the Reorder Request Queue window with the borrower currently selected (indicated by the arrow, above) as the one being changed in the queue:
The name of the borrower being moved in the queue is displayed on the screen, along with his or her current position.

4. In the To Position field, enter the new queue position for this borrower and press **OK**. (In this example the borrower in position 1 is being moved to position 3.) Horizon displays a screen like the following:

![Reorder Request Queue](image)

The borrower is moved from position 1 to position 3 in the queue. The person who was in position 2 before the queue was reordered moves to the top of the queue and becomes the next person in line to obtain a hold on the requested item.

**DELETING A REQUEST**

Follow these steps to delete a request:

1. Conduct a search for the title or item you want to request and display it in the Bib Detail window:
2. Choose View Borrower Request List from the Navigation Bar.

The Borrower Search window appears:

3. Choose Borrower Last Name Alphabetical and enter the first few letters of the borrower’s last name in the Search for box, then click OK to search for that borrower.
The system displays a Borrower List window, an alphabetical listing of borrowers, with that portion of the list displayed that most closely matches your entry.

4. Choose a borrower and click **OK**.

   The system displays the Borrower Request List:

   ![Borrower Request List](image)

   In this example, the borrower has placed two requests.

5. Select the item you want to delete from the Borrower Request list and choose **Delete**.

   The system displays a dialog box verifying that you want to delete that selection from the list.

6. Choose **OK** to complete this task.
Horizon lets you quickly access lists of newly added titles and authorities. These lists are limited to 500 entries. Catalogers control authority list content and Day End process controls title list content.

You can access the four New Additions lists from the New Additions menu:

- **View New Titles.** Displays a list of titles added since a specified date.
- **View New Authors.** Displays a list of authors added since a specified date. This screen also lets you view the titles of these authors.
- **View New Subjects.** Displays a list of subject records added since a specified date.
- **View New Series.** Displays a list of series records added since a specified date.

**VIEWING NEW TITLES**

In Staff PAC you can see those new titles that have been added to the system since a specified date. The list of new titles is cleared by Day End process. (The frequency is determined by your system administrator.)

Follow these steps to view new titles added to the system:

1. Conduct a search for the title or item you want to request and display it in the Titles List window.
2. Choose View New Titles from the New Additions folder on the Navigation Bar:

The system displays a Titles Added window similar to this one:

![View New Titles](image)
You can double-click on a subject to display a Bibliographic Detail window for the item.

3. If you accessed the Bibliographic Detail window, choose Cancel to close it and return to the Subjects Added window.

4. Choose Cancel again to return to the Main Search window.

**VIEWING NEW AUTHORITIES (AUTHORS, SUBJECTS, OR SERIES)**

When your library adds MARC records with data stored in authority-controlled fields (author, subject, or series), Horizon indexes the record and in the process, places new authority-related information in lists that you can view from the New Additions menu.

The lists of new authorities are periodically cleared by catalogers. Catalogers and Reference librarians use the three authority lists to see what new subjects, series, or authors have been added to the system.

Follow these steps to view an authority list (in this example, subject):

1. Conduct a search for the title or item you want to request and display it in the Titles List window.
2. Choose View New Subjects from the New Additions menu:

   ![Subjects Added window](image)

   The system displays a Subjects Added window similar to this one:
You can double-click on a subject to display a Bibliographic Detail window for the item. If more than one title has been added under this authority, you will see them displayed in another List window.

3. If you accessed the Bibliographic Detail window, choose **Cancel** to close it and return to the Subjects Added window.

4. Choose **Cancel** again to return to the Main Search window.
Exercises