

INSTRUCTIONS FOR ADDING HOLDINGS INFORMATION IN HORIZON

PART ONE: FINDING A MATCH

Log in to Horizon.

Strike the F2 key to begin your search, **or** double click on the Searching and New Search menu items on the left.

Select the type of search you want to execute by clicking on it. The best search key to use for a match is the **ISBN**, then **Title Browse**, then **Author Browse**.

Scan the ISBN, or type the title, or author (last name first).

If you use the ISBN search, you will retrieve either one matching record, or none. This search is the quickest, as you can be reasonably sure of a good match. Scan the bibliographic record quickly to make sure that it meets the criteria in the box below.

If using title browse, you will see a list of titles. Look through the resulting list for a match. Click on the best match, then use the "Show Detail" button to get more information. Check to see that the record matches according to the criteria below.

If the author's name is used there are often multiple listings and the search must be narrowed, or sorted, usually by title. Be sure to hit the *resume* choice to include all works by the author before sorting the results. Then look for a match among the titles. Click on the best match, then use the "Show Detail" button to get more information. Check to see that the record matches according to the criteria below.

Once you locate a bibliographic record that seems to match the title you are searching for, compare the following to make sure the record represents an exact match:

- Exact title
- Copyright date
- Publisher
- Number of pages

If you have **not** been able to find a good match by ISBN, try a second search by title browse or author browse. If you still cannot find a match, you will need to send information to CEF about the item you are trying to catalog. You can use the online MARC form at <https://cefls.org/stafftrustees/library-staff/>. The Technical Service Department will obtain a MARC (Machine Readable Cataloging) Record and will send back your information so that you can then add the item.

If the record is a good match based on the criteria above, use the "Show Copies" button to see the holdings. If the "Show Copies" button is grayed out, there are no items attached to the record. You can skip down to "Creating a New Item Record" for the next step.

PART TWO: ADDING YOUR HOLDINGS INFORMATION

The following includes instructions for both mouse and keyboard use.

Now that you have found a match and have gone through “Show Detail” and “Show Copies”, you are looking at a list of items. It could be empty, or it could have many items. If it is empty, use the “Other Locations” button to see items at other libraries.

There are several things you might want to do at this point.

If you found an item at your library, and it’s the same item you wanted to add (not another copy but the exact same item), you may want to edit a few of the fields for accuracy. You might want to change the item type, collection or call number for example. See “**Editing an Item Record**” below.

If you found no items attached to the record, you will want to create a new item. See “**Creating a New Item Record**” below.

Creating a New Item Record

To create a new item record, you can start either on the Bibliographic Detail screen (the one you get when you click on “Show Detail”) or the Copies screen. From either screen you will use F10 or the “Send To” button to send the record to the Copy/Item list.

Once you have the Copy/Item list, do the following:

1. Either click on **New** or simultaneously strike CTRL and N. The top of the window will say “Edit Items for Bib-----“and the prompt will be for a Barcode Number.
2. Scan or key in the next 14-digit barcode number from your sheet of barcodes.
3. Tab to or click on **Item Type**, enter the correct type (f, nf, v, etc.). Use “Codes” to list your choices. The first letter you key in will prompt the system to fill in the entire code.
4. Tab to or click on **Location**. Type the first two letters and the system will fill in the rest, and your library name will appear in blue letters to the right. This is a good check that you are typing correctly.
5. Optional: Tab to or click on **Owning Note**. Type your 3-letter code (all caps).
6. Tab to or click on **Collection** and enter the first letters of the collection code (the system will fill in the entire code). Use “Codes” to list your choices if you are unsure.
7. Tab to or click on **Call Number** and type it in exactly as it is on the card or book: no slashes or dashes, with a single space between the call number and the letters of the author’s last name.
8. Click on **Save** and then on **Close**. You can do a new search at this point by pressing the **F2** button on your keyboard.