

# Horizon Cataloging Training Manual

This manual provides brief instructions on the most common tasks that catalogers do. **As of Jan. 31, 2006, it is not complete.** If you need to do a task not covered here, or would like aid with any procedure, please contact the catalogers at the SEO Library Center at 1-800-282-2779.

## Searching

Bib Quick Search  
Staff Pac Searching

## Features of Staff Pac Searching

## Adding and editing GMDs

## Items

Linking  
Moving  
Deleting  
Item Group Editor

## Horizon cataloging Hot keys

### Searching

ESC Back  
F2 Search PAC  
F10 MARC editor  
\* truncation search  
? wildcard search

### Editing

F4 Reformat  
F8 Show errors  
F5 Show holdings  
F11 Show bib

## Searching

There are two main ways to search in Horizon.

### 1. Bib Quick Search:

\*Used when you have a number available to search: a bib record number, an OCLC number, an ISSN, etc.

\*Brings up only one record.

\*Displays records in MARC format, so it is ready for linking, editing, and other cataloging procedures.

### 2. Staff Pac Search:

\*Used when you have words available to search: titles, authors, subjects, keywords, etc. It is also possible to search numbers using Staff Pac

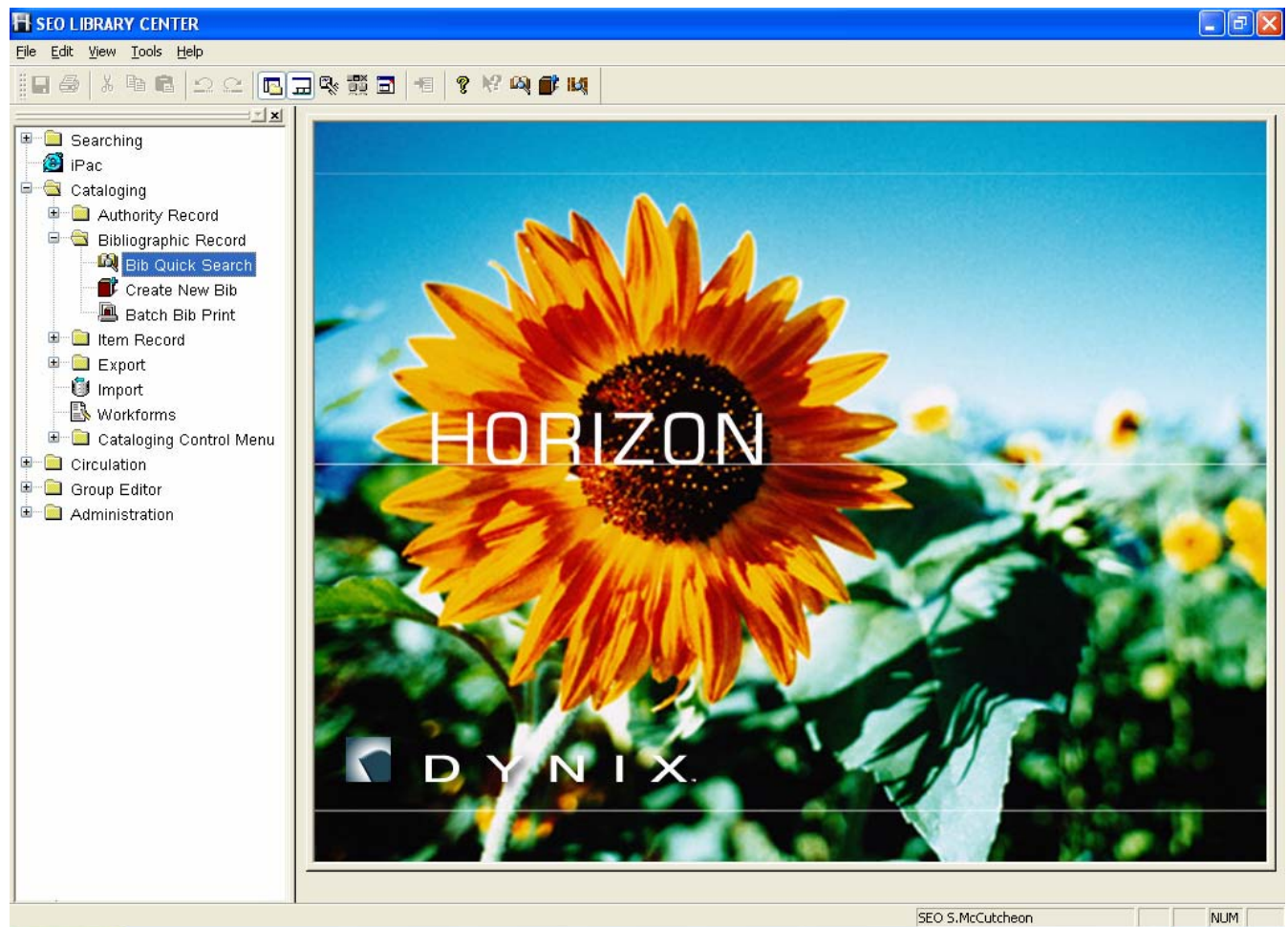
\*A search using Staff Pac can bring up multiple records.

\* Displays records in non-MARC format for viewing or placing holds. In order to catalog a record found using Staff Pac, the record must be sent to the MARC Editor.

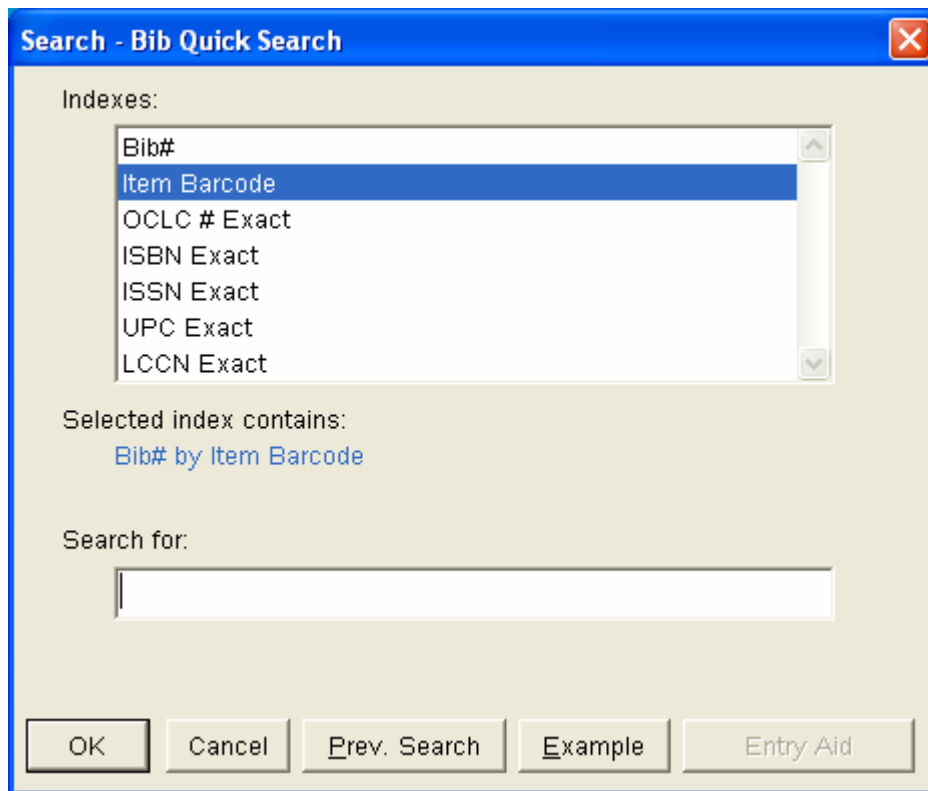
### Bib Quick Search

Use any of these ways to bring up the Bib Quick search box

- A. Type **B + F9** from any screen. From the Sunflower screen, you can also type **B** by itself.
- B. Click the **Bib Quick Search Icon** at the top of the toolbar. It looks like an open book with a magnifying glass.
- C. From the navigation bar, click on **Cataloging, Bibliographic Record**, then double-click on **Bib Quick Search**



- When the Bib Quick Search screen appears, choose your search by either:
- A. Pointing and clicking with your mouse, or
  - B. Pressing the up and down arrows on your keyboard.



### Staff Pac Search

Use any of these ways to bring up the Staff Pac search box

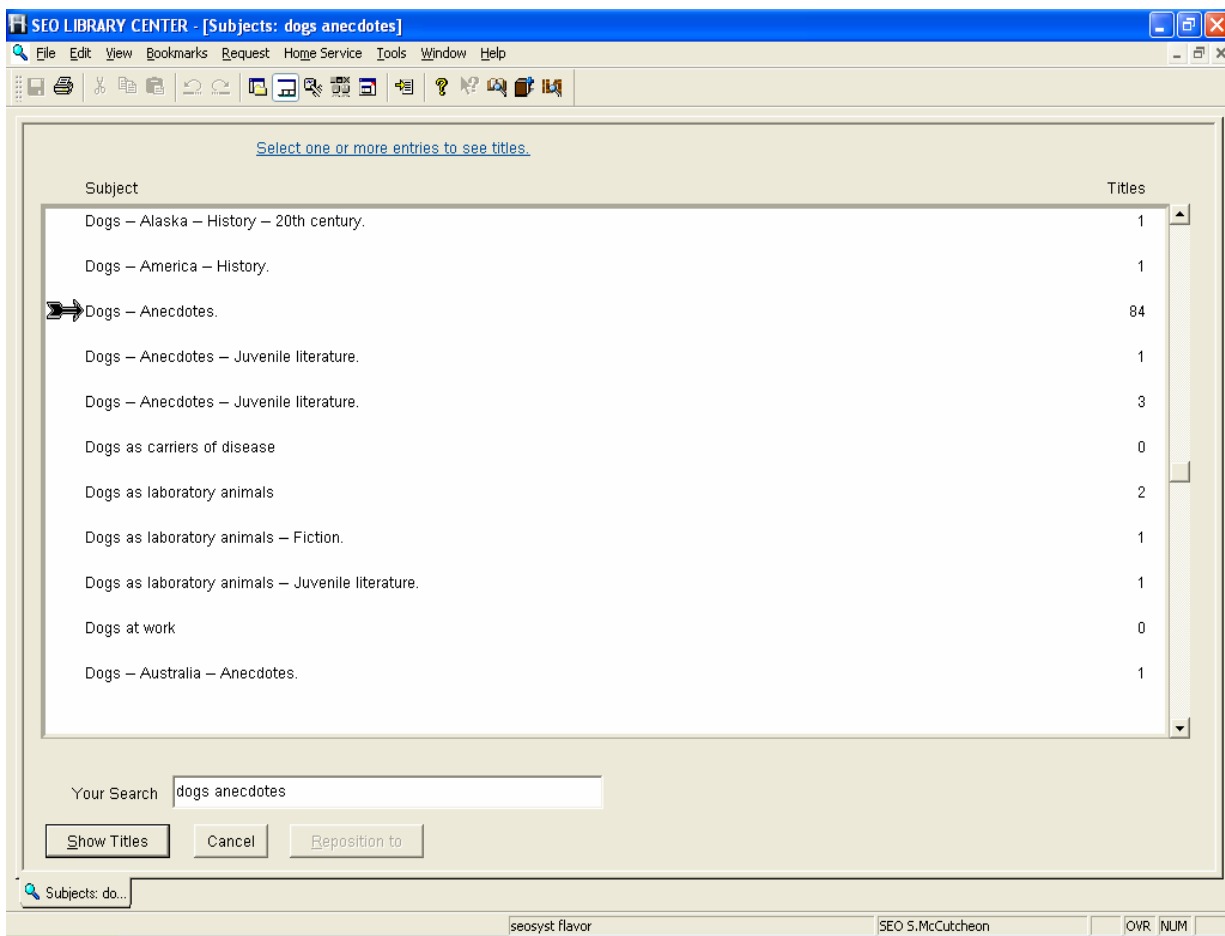
- A. Type **F2** from any screen, or,
- B. From the navigation bar, click on **Searching**, then double-click on **New Search**.

## Moving around in Staff Pac Searching

Note that the many Browse searches (Title browse, Subject browse, Series browse) look for the words in exact order, alphabetically.

Keyword searches (General keyword, Title keyword, Subject keyword) look for the words in any order.

Below is an example of a Subject Browse search on “Dogs – Anecdotes”



The screenshot shows a web browser window titled "SEO LIBRARY CENTER - [Subjects: dogs anecdotes]". The browser's address bar and menu bar are visible. The main content area displays a list of subject terms and the number of titles associated with each. The term "Dogs – Anecdotes" is highlighted with a mouse cursor. Below the list, there is a search input field containing "dogs anecdotes" and three buttons: "Show Titles", "Cancel", and "Reposition to".

Subject	Titles
Dogs – Alaska – History – 20th century.	1
Dogs – America – History.	1
Dogs – Anecdotes.	84
Dogs – Anecdotes – Juvenile literature.	1
Dogs – Anecdotes – Juvenile literature.	3
Dogs as carriers of disease	0
Dogs as laboratory animals	2
Dogs as laboratory animals – Fiction.	1
Dogs as laboratory animals – Juvenile literature.	1
Dogs at work	0
Dogs – Australia – Anecdotes.	1

Your Search: dogs anecdotes

Buttons: Show Titles, Cancel, Reposition to

Subjects: do...

Footer: seosyst flavor, SEO S.McCutcheon, OVR. NUM

To see the 84 items under “Dogs – Anecdotes” do any of these:

- A. Enter. You will see whatever entry the arrow is pointing to.
- B. Click on the button at the bottom, Show Titles.
- C. Press Atl + S.

Note that the S in Show Titles is underlined. Whenever you see an underlined letter, you can type Alt + the underlined letter to complete that command.

SEO LIBRARY CENTER - [Search for:: Dogs -- Anecdotes.]

File Edit View Bookmarks Request Home Service Tools Window Help

Select one or more entries to see more detail.

Title/Author	Pub date	Format
1. Corky / by Patricia Scarry ; illustrated by Irma Wilde. Scarry, Patricia M., 1924-	[c1962]	
2. The ugly dachshund, by G. B. Stern. Stern, G. B. (Gladys Bronwyn), 1890-	1938.	
3. Every night, Josephine! Susann, Jacqueline	1974 [c1970]	
4. Poodlestan, a poodle's eye view of history, by Bete Noire as told to Paul-Henry, Paul-Marc, 1918-	1965.	
5. Reigning cats and dogs / Sonia Levitin ; drawings by Joan Berg Victor. Levitin, Sonia, 1934-	1978.	
6. Wilderness champion; the story of a great hound. Illustrated by Paul Lippincott, Joseph Wharton, 1887-1976	[c1944]	
7. Silver Chief, dog of the north, by Jack O'Brien ... Illus. by Kurt Wiese. O'Brien, Jack, 1898-1938	[1933]	
8. Stickeen: the story of a dog. Introd. by Marshall Kuhn. Illus. by Ben Stahl. Muir, John, 1838-1914	1974.	
9. Especially dogs ... especially at Stillmeadow [by] Gladys Taber. Taber, Gladys Bagg, 1899-	[1968]	
10. Hound dogs and others; a collection of stories by members of Western Western Writers of America.	[1970, c1958]	
11. Flush, a biography by Virginia Woolf. Woolf, Virginia, 1882-1941	[c1933]	

Selection   Retrieved 30 of 84 search complete

Not sorted 100.0 %

Subjects: d... Search for: ...

seosyst flavor SEO S.McCutcheon

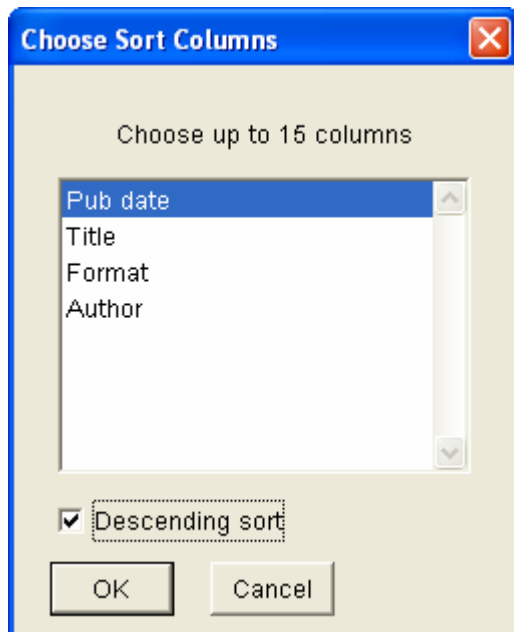
Try out the other commands available.

Right now, only 30 of 84 items have been retrieved.

A. Resume (Alt + M) to see the rest.

B. Sort (Alt + S) to see titles listed by date, author, etc.

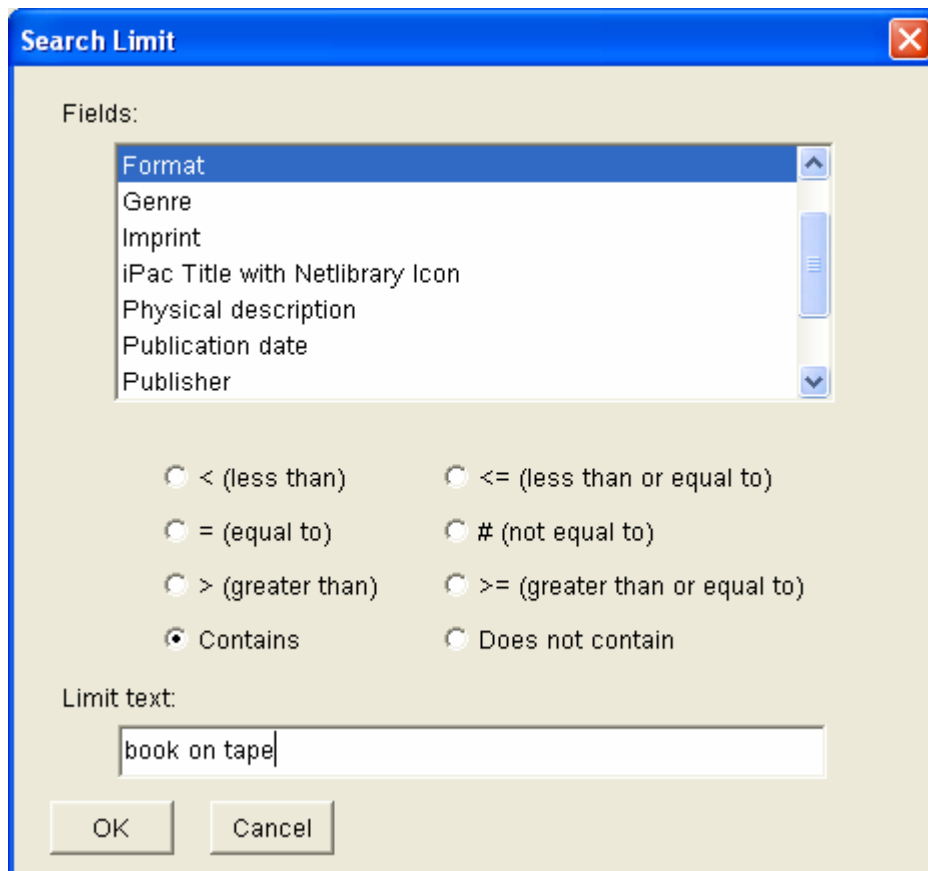
Click on “Descending sort” if you wish to see the list by most recent publishing date to the earliest.



C. Limit (Alt + L) to limit.

To limit by format, choose:

Format, Contains, then type the GMD (format) you wish to see.



D. To get out of any record or screen you no longer need, press Escape.

## Getting ready to Catalog: Send Record to MARC Editor

In order to link items, edit the GMD, or any other cataloging task, the record must first be sent from Staff Pac to the MARC editor.

1. First, Select the title(s) that interest you.

Ways to select a title:

If the title you want has the arrow next to it,

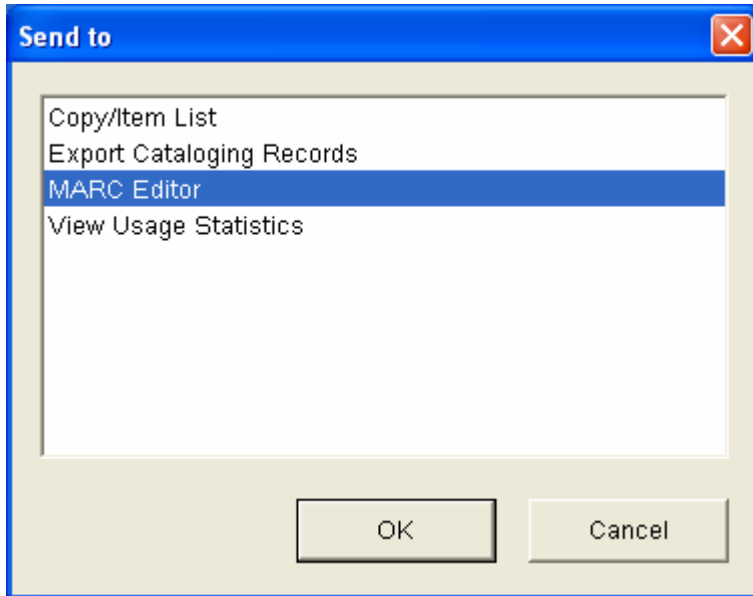
- A. Press Enter,
- B. Press the Show Detail button, or
- C. Type Alt + S to Show Detail

If you want several titles, highlight them.

2. Send to MARC Editor. Either:

A. Press F10. Arrow down to MARC Editor. Enter  
or

B. Click the Send To icon at the top of the toolbar. The icon looks like a paper with a yellow arrow pointing to it.



## Editing and Adding GMDs

See fuller explanations and examples of GMDs on the SEO website, under the tab: GMD List, and Adding GMDs

### **Editing an existing GMD:**

1. Search and find the matching record; press F10 to send the record to the MARC editor. Select MARC Editor from the list and click OK. *(Note: if searching in Bib QuickSearch, the record comes up in the MARC editor)*
2. Highlight the words to be changed that are inside the brackets.
  1. Type the new GMD over it.
  2. Click the Save icon.

### **Adding a GMD where none exists:**

This is most often needed for large print books, board books, musical scores, and maps (atlases).

1. Search and find the matching record; press F10 to send the record to the MARC editor. Select MARC Editor from the list and click OK. *(Note: if searching in Bib QuickSearch, the record comes up in the MARC editor)*
2. Place cursor after the main title, after the 245 \$a but before the subtitle or author.
3. Either click Edit from the Menu bar, or right click the mouse to bring up a box of options.
4. Chose Insert Subfield.
5. Type the subfield h, beginning bracket, the appropriate GMD, ending bracket, and a space.
3. Click the Save icon.

## Linking items

Preliminary steps to linking:

1. Search and find the matching record; press F10 to send the record to the MARC editor. Select MARC Editor from the list and click OK. *(Note: if searching in Bib QuickSearch, the record comes up in the MARC editor)*
2. Click the Items icon or press F5 to view the Items screen.

Once you're on the Items screen, choose one of the options below to link items:

A. Plain vanilla linking:

1. From the items screen, click the New button to add a new item.
2. Complete the fields in the item record
3. Save and close the record.

B. To link items using the Copy command:

1. From the items screen, select an item from your library.
2. From the File menu, choose Copy.
3. Complete the item record.
4. Save and close the record.

C. To link items using Batch Create:

1. From the items screen, select an item from your library.
2. Click the Batch Create button.
3. Fill in the range of barcodes for your items.
4. Save and close the record.

The Batch Change feature (selecting items and clicking the Edit button) can be used to edit item records.

## Moving items from one record to another

*(Identify the correct record first, and then manage the process from the incorrect record)*

If you don't know the Horizon bib ID/OCLC number:

1. Search the catalog and identify the correct record; press F10 and send it to the MARC editor;
2. Search the catalog and identify the incorrect record; press F10 and send it to the MARC editor.
3. Then press F5 to view the holdings.
4. Select / highlight the holding(s) you wish to move.
5. Go to the Item drop down menu and choose Relink Items

6. A dialog box will appear and ask if you wish to relink items from the current record (identified by Bib ID number) to one of the records listed in the box below. Highlight the correct Bib ID number and click OK.

If you do know the Horizon Bib ID/OCLC number:

1. In Bib Quick Search, enter the Bib ID or OCLC number of the correct record;
2. In Bib Quick Search, enter the Bib ID or OCLC of the incorrect record; press F5 to view the holdings.
3. Select / highlight the holding(s) you wish to move.
4. Go to the Item drop down menu and choose Relink Items
5. A dialog box will appear and ask if you wish to relink items from the current record (identified by Bib ID number) to one of the records listed in the box below. Highlight the correct Bib ID number and click OK.

### Deleting items

From the items screen:

1. Select the item record.
2. From the File menu, choose Delete.

From the navigation bar:

1. Under Cataloging, Item Record, select Batch Item Delete.
2. In the Compound Search box, confirm that the Append List box is checked; enter the barcodes of the items. Close the box when you are finished entering barcodes.
3. Highlight and select all the barcodes to be deleted.
4. From the File menu, choose Delete record, or right-click to access the Delete command.
5. A 'Batch Item Delete Options' dialog box appears. Select the option, "Delete Bib". Click OK to begin the deletion process. The system will respond with a confirmation message, "Batch item deletion is complete. X items deleted."

## Item Group Editor

Item Group Editor lets you make permanent or temporary changes to existing item records by creating groups of items.

### To create a group of items:

1. Select Item Group Editor from the Group Editor menu on the navigation bar.
2. In the Compound Search box, check the box "Append List," then scan or enter the barcodes of the items. (If you manually enter the barcodes, you have to click Search after each barcode or press the Enter key).

*Note: If you forget to check the Append List box after entering a barcode, either press <alt><F2> or go the File menu and choose Compound Search to bring back the box. At that point, check Append List and continue entering barcodes.*

3. Highlight the items in the 'List: Item Group Editor' window that you want to include in your group. To highlight the entire list, choose **Edit, Select All**.
4. Choose **Group, Create Group**.
5. Enter a new name for the group in the Group name field. You can add a date as part of the name to keep your groups organized. To view groups already established, click the Groups button. When naming a group, give it a unique name, or the system will ask if you want to replace an existing group.

### Adding to an existing group

To add items to an existing group after it has been created follow these steps:

1. Retrieve the group (Group, Retrieve Group)
2. Highlight and select the items in the group.
3. Press <alt> <F2> to bring up the Compound search screen and enter the barcodes of the items to be added.
4. Choose **Group, Create Group**.
5. Enter the same name for the group in the Group name field. The system will ask if you want to be replace the existing group. Click Yes.

### **Making changes to a group**

*(If you are making temporary changes, archive the group first)*

1. Open Item Group Editor.
2. Click Cancel or close the Compound Search window; click Cancel or close the box asking if you want load all the rows in this large view.
3. Click on **Groups** at the top of the screen, and from the drop down menu select, **Retrieve Group**.
4. Click the Groups button to see a list of groups; double click to select the appropriate group.
5. Select the items you want to change. To highlight all items in the group, click on Edit at the top of the screen, from the drop down menu, Select All.
6. Click Edit; click OK when Horizon asks if you want to make a batch change.
7. Enter any information that you want to change for the items in the group.
8. Save and Close the window.

### **Deleting a group**

If you no longer need a group record, you can delete it. Deleting a group does not delete information from the catalog. If a group has been archived, see the instructions under Archived Groups for deleting an archived group.

To delete a group:

1. Choose Group, Delete Group.
2. Enter the group name and click OK.