Horizon
Horizon Basics
User’s Guide
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This document is compatible with Horizon Version 7.5. It may also be compatible with later versions.

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Contents

C H A P T E R  1

Getting Started ................................................................. 1-1
  Welcome ............................................................................. 1-3
  About This Guide .......................................................... 1-3
    Chapters......................................................................... 1-3
    Online Guides and Web Updates ................................. 1-4
    Feedback ......................................................................... 1-4
    Disclaimer....................................................................... 1-4
    Conventions .................................................................... 1-5
      Mouse Conventions ..................................................... 1-5
      Keyboard Conventions ............................................... 1-5
      General Conventions ................................................ 1-5
  Getting Help ....................................................................... 1-5
  Windows Basics .............................................................. 1-6
    Checking or Changing Windows Date Settings ............. 1-8
    Changing the Display Color for Explanations in Certain Dialog Boxes .......................... 1-8
  Horizon Overview .......................................................... 1-10
    Logging In to and Out of Horizon ............................... 1-10
      Logging In to Horizon ............................................... 1-11
      Changing Users or Logging Off ................................. 1-14
    Horizon Processes ....................................................... 1-14
    Horizon Security ........................................................ 1-15
    Record Ownership ......................................................... 1-16

C H A P T E R  2

Horizon User Interface ..................................................... 2-1
  About the Horizon User Interface ...................................... 2-3
  Overview of the Launcher ................................................. 2-4
    Menu Bar .......................................................................... 2-6
    Toolbar ........................................................................... 2-7
      Buttons on the Default Toolbar .................................. 2-7
      Displaying or Hiding a Toolbar .................................... 2-9
      Moving a Toolbar ........................................................ 2-9
    Navigation Bar .............................................................. 2-10
      Displaying or Hiding the Navigation Bar .................. 2-10
      Moving the Navigation Bar ......................................... 2-11
    Workspace ....................................................................... 2-12
    Workbook ....................................................................... 2-15
Overview of Horizon Process Windows ................................................................. 2-16
Search Windows .................................................................................................... 2-16
List Windows ......................................................................................................... 2-17
  Changing the Columns in a List Window ............................................................... 2-18
  Sorting a List Window ............................................................................................ 2-21
  Choosing Items from a List ..................................................................................... 2-22
Edit Windows .......................................................................................................... 2-24
  Codes ....................................................................................................................... 2-25
  Groups ..................................................................................................................... 2-26
Using Shortcut Keys and Right-click Menus .......................................................... 2-26
  Shortcut Keys ......................................................................................................... 2-27
  Right-click Menus .................................................................................................. 2-29
Working with Grids and Forms ............................................................................. 2-31
  About Grids and Forms .......................................................................................... 2-32
  Viewing Basic Information about a Grid or Form ................................................. 2-34
  Adding a Row to a Grid ............................................................................................ 2-35
  Sorting the Contents of a Grid ............................................................................... 2-36
  Filtering the Contents of a Grid .............................................................................. 2-38
  Searching or Replacing the Contents of a Grid ................................................... 2-40
  Temporarily Changing the Display of a Grid ....................................................... 2-41
  Refreshing the Information in a Grid ...................................................................... 2-43
  Exporting the Contents of a Grid or Form .............................................................. 2-44
  Deleting a Row from a Grid .................................................................................... 2-48

C H A P T E R  3

Basic Tasks ............................................................................................................... 3-1
  About Basic Tasks .................................................................................................. 3-3
  Starting a Horizon Process .................................................................................... 3-3
    Using the Mouse to Start a Process ...................................................................... 3-4
    Using the Keyboard to Start a Process .................................................................. 3-5
    Activating an Open Process Window or Record ............................................... 3-7
  Saving Data to a File .............................................................................................. 3-7
  Sending Data to Another Process .......................................................................... 3-9
  Changing Information for a Group of Items ....................................................... 3-12
  Entering Special Characters and Diacritics ......................................................... 3-14
    Using Diacritic Shortcuts from the Keyboard ..................................................... 3-15
    Using the Diacritic Shortcut Bar ........................................................................... 3-16
    Using the Diacritic Button Bar ............................................................................. 3-17
    Using ALA Hex Set Codes to Enter Diacritics .................................................. 3-18

C H A P T E R  4

Searching .................................................................................................................. 4-1
  About Searching .................................................................................................... 4-3
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup for Searching</td>
<td>4-4</td>
</tr>
<tr>
<td>Records You Can Search For</td>
<td>4-4</td>
</tr>
<tr>
<td>Types of Searches</td>
<td>4-5</td>
</tr>
<tr>
<td>Entering a Search Term</td>
<td>4-6</td>
</tr>
<tr>
<td>Searching Processes</td>
<td>4-6</td>
</tr>
<tr>
<td>Searching Paths</td>
<td>4-7</td>
</tr>
<tr>
<td>Main Search Window</td>
<td>4-9</td>
</tr>
<tr>
<td>Title Alphabetical Browse List Window</td>
<td>4-9</td>
</tr>
<tr>
<td>Authority Alphabetical Browse List Window</td>
<td>4-10</td>
</tr>
<tr>
<td>Authority List Window</td>
<td>4-10</td>
</tr>
<tr>
<td>Titles List Window</td>
<td>4-11</td>
</tr>
<tr>
<td>Bibliographic Detail Window</td>
<td>4-11</td>
</tr>
<tr>
<td>Copies Window</td>
<td>4-12</td>
</tr>
<tr>
<td>Basic Searching</td>
<td>4-12</td>
</tr>
<tr>
<td>Doing a Basic Search</td>
<td>4-12</td>
</tr>
<tr>
<td>Keyword Searching</td>
<td>4-13</td>
</tr>
<tr>
<td>Doing a Keyword Search</td>
<td>4-14</td>
</tr>
<tr>
<td>Viewing a Keyword List</td>
<td>4-16</td>
</tr>
<tr>
<td>Using Keyword Browse in Unicode</td>
<td>4-18</td>
</tr>
<tr>
<td>Alphabetical Searching</td>
<td>4-18</td>
</tr>
<tr>
<td>Searching Features</td>
<td>4-20</td>
</tr>
<tr>
<td>Restricting a Search</td>
<td>4-20</td>
</tr>
<tr>
<td>Sorting a Titles List</td>
<td>4-22</td>
</tr>
<tr>
<td>Limiting a Titles List</td>
<td>4-22</td>
</tr>
<tr>
<td>Limiting a Titles List Using Dates</td>
<td>4-25</td>
</tr>
<tr>
<td>Limiting a Search by Volume</td>
<td>4-25</td>
</tr>
<tr>
<td>Viewing Related Works</td>
<td>4-26</td>
</tr>
<tr>
<td>Conducting a Previous Search</td>
<td>4-27</td>
</tr>
<tr>
<td>Requesting Items</td>
<td>4-28</td>
</tr>
<tr>
<td>Making a Request</td>
<td>4-28</td>
</tr>
<tr>
<td>Viewing a List of Requests</td>
<td>4-30</td>
</tr>
<tr>
<td>Editing a Request</td>
<td>4-32</td>
</tr>
<tr>
<td>Reordering Names in a Request Queue</td>
<td>4-33</td>
</tr>
<tr>
<td>Deleting a Request</td>
<td>4-34</td>
</tr>
<tr>
<td>Viewing Detailed Information about an Item</td>
<td>4-34</td>
</tr>
<tr>
<td>Saving a List of Bib or Item Records</td>
<td>4-35</td>
</tr>
<tr>
<td>Bookmarking a Record</td>
<td>4-36</td>
</tr>
<tr>
<td>Viewing a Bookmark List</td>
<td>4-36</td>
</tr>
<tr>
<td>Printing a Bookmark List</td>
<td>4-38</td>
</tr>
<tr>
<td>Saving a Bookmark List to a File</td>
<td>4-38</td>
</tr>
<tr>
<td>Deleting a Bookmark Entry</td>
<td>4-38</td>
</tr>
<tr>
<td>Other Types of Searching</td>
<td>4-39</td>
</tr>
<tr>
<td>Doing a Compound Search</td>
<td>4-40</td>
</tr>
<tr>
<td>Doing an Expert Search</td>
<td>4-42</td>
</tr>
<tr>
<td>Searching for New Additions</td>
<td>4-44</td>
</tr>
<tr>
<td>Searching Different Databases</td>
<td>4-46</td>
</tr>
<tr>
<td>Searching a Z39.50 Database</td>
<td>4-46</td>
</tr>
<tr>
<td>Searching another Horizon Database Using a Stand-alone Staff Searching Program</td>
<td>4-47</td>
</tr>
</tbody>
</table>

Index ......................................................................................................................... In-1
Getting Started

This chapter provides you with the basic information you need to begin using this guide. It gives you an overview of this guide, tells you where you can get additional help, and explains Windows basics.

It also gives you a brief overview of Horizon, explains how to log in to and out of the Launcher, and introduces Horizon processes, security, and record ownership.

Welcome 1-3
About This Guide 1-3
Getting Help 1-5
Windows Basics 1-6
Horizon Overview 1-10
Welcome

Welcome to the Horizon Basics Guide. This guide explains basic information about Horizon library automation software. It gives you a brief overview of the software, and explains how to work in the Launcher environment and in Horizon windows. It also explains basic tasks you may need to do as you work in Horizon, and how to search for information using Horizon’s staff searching interface.

About This Guide

This guide is for library staff. It may also be helpful to new Horizon system administrators. All of the user’s, setup, and administrator’s guides for Horizon assume that you are familiar with the information in this guide.

This section explains these topics:

- Chapters
- Online Guides and Web Updates
- Feedback
- Disclaimer
- Conventions

Chapters

This guide contains these chapters and major sections:

- Chapter 1, “Getting Started,” explains the basic information you need to begin using this guide. It gives you an overview of this guide and lists the Microsoft Windows tasks you should know how to do before using Horizon. It also gives a brief overview of the main categories of Horizon processes, and explains how to log in and out of Horizon.

- Chapter 2, “Horizon User Interface,” explains the basic features of the Horizon staff user interface. It gives an overview of the Launcher interface (the framework that lets you open Horizon processes). It also gives an overview of the different types of windows you use in Horizon, including grids and forms.

- Chapter 3, “Basic Tasks,” explains basic Horizon tasks that apply to many different Horizon processes. It explains how to activate a Horizon process and work in the windows within a process. It also explains how to change information for a group of items and how to enter special characters (diacritics) in Horizon records.

- Chapter 4, “Searching,” explains how to find items in your library catalog using basic and advanced searching methods. It also explains how to use searching features to customize your search, work with your search results, or do special types of searches.

- Index to the guide.
Online Guides and Web Updates

In addition to the printed copy, this guide is available online as a PDF (Portable Document Format) file. You can install the PDF files from the Horizon installation CD. To view any PDF file, you must install Adobe’s Acrobat Reader on your workstation. (This software is provided by Adobe free of charge.) You can download the latest version of Acrobat Reader from Adobe’s web site at “www.adobe.com”. Once you have installed the PDF files and Acrobat Reader, you can access the files by choosing Launch Help Center from the Help menu in Horizon, or by pressing F1. You can also view a copy of the Horizon Basics Guide in the Help Center.

You can also access the most current PDF version of this guide at SirsiDynix’s customer web site at “clientcare.sirsidynix.com”. Accessing the Horizon Documentation site on the Web requires a login and password. If you do not already have a login and password, contact your system administrator.

Feedback

The Documentation Team at SirsiDynix wants to provide you with the most complete and useful documentation possible. If you have any comments about this guide, please let us know. We appreciate your feedback and we will use it to improve future versions of the guide. You can send your comments via e-mail to “docs@sirsidynix.com”. If you need immediate assistance, contact your system administrator.

Disclaimer

The process names and sample windows in this guide reflect the default settings that are delivered with most new Horizon installations. The settings on your system may be different from these defaults, depending on your library’s implementation choices and the way your system administrator sets up your Horizon system. (For example, your system administrator can add fields to windows, reorganize the processes that display on the navigation bar, and set up security to limit access to certain processes.) Additionally, as you use Horizon, you can resize windows or customize your Launcher workspace. Consequently, your Horizon environment may look and function differently than the environment described in the tasks in this guide. (For information about customizing and restoring window size or the Launcher workspace, see the Launcher Configuration Guide.)
Conventions

This section explains the documentation conventions used in this guide.

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 place the mouse pointer on an icon, command, or button and quickly press and release the primary mouse button twice.
- **Right-click.** To place the mouse pointer on an icon, command, or button and quickly press and release the secondary (usually the right) button.
- **Drag.** To press and hold the primary mouse button while moving the mouse.
- **Choose.** To select an option from a menu, group of options, or list.
- **Highlight.** To click once on an option in a list so the option is selected and displays in reverse video. In a field, you may drag the mouse over text to highlight that text.

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 labeled 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 the ALT key and press the H key.)
- 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

- 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.)
- Text in italics shows general information that you must replace with information that is specific to your system. (For example, you would replace password with a specific password, such as 123gr@ndma.)

Getting Help

When you need help working in Horizon, you can use these sources to find answers to your questions:

- **User’s Guides.** The Horizon user’s guides give step-by-step instructions for the tasks that you can do in Horizon. (For information on online versions of the guides, see “Online Guides and Web Updates” on page 1-4.)
- **Online Help Center.** The Help Center lets you search PDF versions of any Horizon user’s guide you have installed on your workstation as well as the Horizon Basics Guide and the Launcher Customization Guide. You can also use the Help
Chapter 1: Getting Started

Center to access SirsiDynix customer support information and additional SirsiDynix resources on the Web. To access the Help Center, choose the Launch Help Center option on the Help menu or press F1.

- **Customer Service Center on the Web.** Among other things, this site gives you access to documentation updates, technical topics, product updates, and Support Portal. (Support Portal is a database of customer issues and problems about SirsiDynix products that have been logged with Customer Support and have resolutions, which you can search for and view.) To access this site, enter “clientcare.sirsidynix.com” in the Address field of your web browser. Then click the links that take you to the Support Portal. All the links into the Customer Service centers are password protected. To get access, call your Customer Relations Manager.

- **Training.** SirsiDynix provides a wide range of training services. For more information, visit the Training section of SirsiDynix’s customer web site, or in North America call 1-800-713-9649.

If you do not get the help you need from any of these sources, you can contact a customer support representative.

**NOTE**

Only your library’s authorized representative may contact SirsiDynix Customer Support. An authorization code is required.

If you do not already know who to contact for support, you can use this contact information to get started.

**Asia Pacific**
Office: 1-800-882-400 or (61) 388 513 500
Customer Support: support-apac@sirsidynix.com
Fax: (64) 9 920 9659

**France**
Office: (33) 1 39 20 13 80
Fax: (33) 1 39 53 30 82

**North America**
Office: 1-800-288-8020
Customer Support: 1-800-284-3969
Customer Support Fax: 1-801-223-5202

**United Kingdom**
Office: 44 (0) 1494 777 500
Customer Support: helpdesk-uk@sirsidynix.com
Fax: 44 (0) 1494 777 600

**NOTE**
For the latest contact information (including global offices), visit “clientcare.sirsidynix.com”.

**Windows Basics**

This guide assumes that you have a basic knowledge of your Windows operating system. At the minimum, you should know how to do these tasks:
- 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, 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.)

Before you start using Horizon, you may need to adjust some of your Windows settings on your workstation.

This section explains these topics:
- Checking or Changing Windows Date Settings
- Changing the Display Color for Explanations in Certain Dialog Boxes
Checking or Changing Windows Date Settings

When you enter a date in Horizon, you must use the format that is specified in your Windows settings (for example, MM/DD/YY). If you do not know what format to use, you can do these steps to check or change your Windows date settings:

**To check or change Windows date settings**

1. At your Windows desktop, choose **Start, Settings, Control Panel**.
2. Double-click **Regional Settings** to display the Regional Settings Properties window.
3. Click the **Date** tab. Windows displays your date settings.
4. If you want to use a different setting, highlight the format you want in the **Short date style** drop-down list.
5. Click **Apply** to save your change, then click **OK** to close the window.
6. Close the Control Panel window.

Changing the Display Color for Explanations in Certain Dialog Boxes

Dialog boxes and windows often give explanations of the content that you can enter, or display other information. Some of this text displays in the color you have assigned to the Windows Desktop. If you use a light color or a light gray for your Desktop color, you may not be able to see the explanations against Horizon’s gray background.

Here are examples of a dialog box and a list window showing text that displays in the Desktop color:

If the Windows Desktop color is set to black, the explanations stand out against the gray background.
The Windows Desktop color setting applies only to your workstation and remains until you change it.

**To change the display color for explanations in certain dialog boxes**

1. At your Windows desktop, choose **Start, Settings, Control Panel**.
2. Double-click **Display** to display the Display Properties window.
3. Click the **Appearance** tab.

   Windows displays the Appearance tab in the Display Properties dialog box:

   ![Display Properties Window]

4. In the **Item** field, choose **Desktop** from the drop-down menu.
5. Choose a color from the **Color** pop-up menu to contrast with the background colors in the Horizon dialog boxes.
6. Click **OK**.

   Windows changes the color of all items controlled by the Desktop color to the color you chose.
7. Close the Control Panel.
Horizon Overview

Horizon is a comprehensive library automation system developed and supported by SirsiDynix (www.sirsidynix.com). As a client/server system, Horizon lets you use client software to log in to a Horizon server, which hosts a database of your library’s records.

Your library can use the Horizon software to do a wide variety of tasks. For example, your library can:

- Maintain an online catalog of books, periodicals, and media items.
- Keep track of the items borrowed from your library and the people who have borrowed them, as well as due dates and fines due.
- Process information about the new items your library buys.

As a library staff user, you can log in to Horizon from any Microsoft Windows-based PC where your system administrator has installed the Horizon client software. Once you log in, you can do your regular library tasks using the Horizon processes that you have security rights to access, or using the records for which you have ownership rights.

This section explains these topics:

- Logging In to and Out of Horizon
- Horizon Processes
- Horizon Security
- Record Ownership

Logging In to and Out of Horizon

Before you can begin using Horizon, you need to know how to log in to Horizon. You also need to know how to change to the next user, or log off of the Horizon system.

This section explains these topics:

- Logging In to Horizon
- Changing Users or Logging Off
Logging In to Horizon

When you log in to Horizon, you can choose the server and database you want to access, then enter a Horizon user name and password. Your user ID is linked to security and preference settings that your system administrator chooses. (For example, your user ID determines which Horizon processes you can access and which processes start automatically when you log in to Horizon. For more information on security, see “Horizon Security” on page 1-15.)

When you log in, you can change some options, such as the location you want to access, and the font type and size you want the Horizon windows to display.

NOTE
If SirsiDynix maintains your Horizon server for you, you must access the Horizon icon by using Citrix client software. (For more information, talk to your system administrator, or see the Citrix Client Setup for Horizon Library Systems Guide.)

To log in to Horizon

1. Log in to the computer where your Horizon client software is installed.

2. Double-click the Horizon icon on your workstation desktop:

   Horizon displays the Horizon Sunrise startup dialog box. If any user has previously logged on to Horizon from your workstation, these fields contain the same settings that were entered the last time a user logged on, except for the password.

3. Do one of these options:
   - If you want to log in using the default information shown in the fields, do these steps:
     1. Enter your Horizon password in the **Password** field.
     2. Click **OK**.
     3. Skip the remaining steps.
   - If you want to change information before logging in, update these fields, as necessary:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Enter your Horizon user ID. This user ID is case-sensitive. Your user ID determines the Horizon processes and menu options that you can access. (You can change users later by choosing <strong>File</strong>, <strong>Change User</strong>.)</td>
</tr>
<tr>
<td>Server</td>
<td>Enter or choose the name of your Horizon server. The server is the computer that contains your Horizon database and runs the SQL server software. The server software allows client workstations to send and retrieve information from the database.</td>
</tr>
</tbody>
</table>

**NOTE**
When you enter a server name for the first time, Horizon asks you to enter a server-specific login and password.
Chapter 1: Getting Started

The first time you access your database, Horizon displays the Login Options dialog box (you can also display this dialog box from the Horizon Sunrise Startup dialog box by clicking the Options button after you enter your password):

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td>Enter your Horizon password. This password is case-sensitive. Your password may occasionally expire. If so, follow your organization’s policy for choosing a new password.</td>
</tr>
<tr>
<td>Database</td>
<td>Enter or choose 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.)</td>
</tr>
</tbody>
</table>

The first time you access your database, Horizon displays the Login Options dialog box (you can also display this dialog box from the Horizon Sunrise Startup dialog box by clicking the Options button after you enter your password):

4 Complete or update these fields as necessary to change your login options:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Choose the library or collection you want to work with. (You can change the location later by choosing File, Change Location.)</td>
</tr>
<tr>
<td>Default Owner</td>
<td>Choose the owner you want to assign to any records you create. (For more information on record ownership, see “Record Ownership” on page 1-16.) You can change the default owner for a login session later by choosing File, Change Default Owner.)</td>
</tr>
<tr>
<td>Language</td>
<td>Choose the language you want Horizon to use on the window displays.</td>
</tr>
</tbody>
</table>
Click **OK**.

Horizon opens the Launcher window:

5. **Activate the Horizon process that you want to work with.**

6. **For information on this**

<table>
<thead>
<tr>
<th>See page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting a Horizon Process</td>
</tr>
<tr>
<td>Horizon Processes</td>
</tr>
<tr>
<td>Overview of the Launcher</td>
</tr>
</tbody>
</table>
**Changing Users or Logging Off**

When you are finished with your work in Horizon, you should either change users or log off to safeguard the workstation from unauthorized use. Changing the user lets the next user access the processes, menu options, and features that he or she has security rights to access without having to shut down and reopen Horizon.

*WARNING*

Never leave your workstation unattended without first changing users or logging off; otherwise, you may give unauthorized users access to the system.

This section explains how to:

- Change users.
- Log off Horizon.

**To change users**

1. If necessary, save changes in any open Horizon windows.
2. Choose File, Change User.
   Horizon displays the Change User dialog box:

   ![Change User Dialog Box](image)

3. In the User field, enter the next user’s user ID.
4. In the Password field, enter the next user’s password.
5. Click OK.
   Horizon changes launcher security and preference settings to match the user ID you entered.

**To log off Horizon**

1. If necessary, save changes in any open Horizon windows.
2. Choose File, Exit, or click the Close button ( ) in the upper-right corner of the Launcher.
   Horizon closes the Launcher.

---

**Horizon Processes**

The Horizon system consists of different features called “processes.” Each process lets your library staff do a certain type of library task. To help your library’s workflow, the default Horizon installation organizes the processes into categories (sometimes called “modules”).
Each category has its own folder on the Launcher navigation bar. (For more information, see “Overview of the Launcher” on page 2-4.) Your system administrator determines which folders and processes you have access to in your Horizon environment.

Horizon includes these main categories of processes:

- **Cataloging.** Lets your library set up and maintain a library catalog. Horizon catalogs both MARC and non-MARC records.

- **Circulation.** Lets your library check items in and out. Circulation also lets you and track information about “borrowers” (the individuals who check out items from your library). (For example, for each borrower you can keep track of contact information, the items checked out, overdue fines, and hold requests.)

- **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. If your library chooses to bind serials issues together, your library may also use Serials Binding, which helps your library organize serials issues for shipment to the company who does the binding.

- **Administration.** Lets your library’s system administrator set up and maintain your library’s Horizon database and security.

Each of these categories of processes are explained in separate user’s or administrator’s guides. Your library may also use additional Horizon products, such as Reserve Bookroom, Media Scheduling, Home Service, or Inventory.

Horizon also includes processes that let you search for items in your library catalog, or for other records on your database, such as purchase orders in Acquisitions. (For more information on searching, see the “Searching” chapter of this guide.)

**NOTE**

Borrowers can search your library’s Horizon catalog by using a web browser to access the Horizon Information Portal searching interface. Depending on how your library chooses to set up Information Portal, borrowers can also use Information Portal to create book lists, place hold requests, and view personal information (such as fines and items checked out). (For more information on Information Portal, see the Information Portal online help or the Information Portal System Administrator’s Guide.)

**Horizon Security**

Your Horizon system administrator manages the security for your library’s Horizon system. You can access a Horizon process only if your system administrator has granted your user ID the rights to access that process.
Some processes or menu options that you do have access to may be protected by a password. While you are working in Horizon, the system may display this dialog box:

Before you can continue with your task, you need to ask your supervisor to enter an authorized user name and password. Your supervisor’s approval applies only for your current task. The next time you access the same function or option, your supervisor will need to enter a user name and password again. (For more information on Horizon security, talk with your system administrator, or see “Securing Horizon” in the “Security and Preferences” chapter of the System Administration Guide.)

Record Ownership

Your library can choose to assign record ownerships to locations, collections, staff groups, or any other owning category your library chooses to set up. When you open an Owned record, you may have restricted rights to edit the record. When you create a new record, the access rights attached to the record depend on the ownership value you assign to the record.

You choose a default ownership value when you log in to Horizon. (For more information, see “Logging In to Horizon” on page 1-11.) You can also change the default owner for your current login session by choosing Change Default Owner from the File menu. (For more information on record ownership, see “Securing Horizon” in the “Security and Preferences” chapter of the System Administration Guide.)
Chapter 2
Horizon User Interface

This chapter explains the basic features of the Horizon staff user interface. It gives an overview of the Launcher and Horizon windows. It also explains how to use shortcuts and right-click menus.

- About the Horizon User Interface 2-3
- Overview of the Launcher 2-4
- Overview of Horizon Process Windows 2-16
- Using Shortcut Keys and Right-click Menus 2-26
- Working with Grids and Forms 2-31
About the Horizon User Interface

The Horizon user interface is similar to the interface of other applications that run on a Microsoft Windows operating system. However, the Horizon interface has many features that are unique to Horizon. This chapter gives an overview of those unique Horizon features. It also helps you to understand how some standard Microsoft Windows features work within the Horizon interface.

The basic framework of the Horizon interface is called “the Launcher.” The Launcher lets you open (or “launch”) the various processes that you use in Horizon, and navigate between those processes. It also lets you customize some areas of your Horizon interface. (For more information on customizing the interface, see the Launcher Configuration Guide.)

Once a process is open, you can work in various types of Horizon process windows. These windows let you view and edit information that is stored in your library’s database. For most processes, you view information in a “list” window, and then edit in an “edit” window. For a few processes, you work in a “grids and forms” interface that lets you complete records more quickly and use tools that help your data-entry efficiency. The windows that display depend on what process you are using and where that process fits in your library’s workflow.

Horizon also lets you use shortcuts and right-click menus to quickly access features and options. This chapter explains these topics:

- Overview of the Launcher
- Overview of Horizon Process Windows
- Using Shortcut Keys and Right-click Menus
- Working with Grids and Forms
Chapter 2: Horizon User Interface

Overview of the Launcher

The Launcher is the basic framework of the Horizon interface. The Launcher lets you easily and quickly access Horizon features in a variety of ways. This section explains the basic features of the Launcher interface. (For information on doing tasks in this interface, see the “Basic Tasks” chapter.)

The Launcher interface includes many of the same features as other Microsoft Windows-based products. Here is an example of the Launcher window, showing an active Horizon process window in the workspace:

NOTE
Your Launcher may appear different, depending on how you or your system administrator has configured your Launcher environment. (For more information on configuring the Launcher, see the Launcher Configuration Guide.)
Overview of the Launcher

The main Launcher window includes these features:

- **Title bar.** Displays the location that you are logged in to. If you have started a Horizon process, it also displays the name of the active process or window.

- **Window Control button.** Lets you minimize or maximize the main Launcher window. Horizon process windows also include this button. (You can also resize the window by clicking the mouse over an edge or corner and dragging the window until it is the size you want.)

- **Windows buttons.** Let you minimize, maximize, or close the main Launcher window. Horizon process windows also include these buttons.

- **Menu bar.** Displays the menus available for the current open process. Clicking on a menu opens a drop-down list of menu options. (For more information, see “Menu Bar” on page 2-6.)

- **Toolbar.** Includes standard Windows buttons and other buttons that let you change the Launcher workspace. Your toolbar may also include buttons that let you open a Horizon process. (For more information, see “Toolbar” on page 2-7.)

- **Navigation bar.** Displays a tree menu of folders that let you open a Horizon process. (For more information, see “Navigation Bar” on page 2-10.)

- **Status bar.** Displays status information, depending on the process you are using. (For example, it may display your user ID or the server and location you are logged in to.) This bar displays by default, but you can hide it by choosing Status Bar from the View menu.

- **Workspace.** Displays any open Horizon process windows. You can choose the position of windows in the workspace, or change the size of the workspace. (For more information, see “Workspace” on page 2-12.)

- **Workbook.** Displays a tab for each open Horizon process window. You can click on a tab to activate (or bring to the front) a window that is currently open. (For more information, see “Workbook” on page 2-15.)

- **Diacritic Shortcut bar and Button bar.** (Not shown) Lets you use short cuts or buttons to enter special characters in Horizon windows. (For more information, see “Entering Special Characters and Diacritics” on page 3-14.)

This section explains these topics:

- Menu Bar
- Toolbar
- Navigation Bar
- Workspace
- Workbook
Menu Bar

The menu bar displays at the top of the Launcher window, and displays only those menus that relate to the process or task that you are currently using. Here is an example of the menu bar that displays at the list window for a new search:

- File
- Edit
- View
- Bookmarks
- Request
- Tools
- Window
- Help

**NOTE**

The menu bar is disabled if you are doing a search, and the Main Search window is open. To close the Main Search window so you can access the menu bar, click Cancel.

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

<table>
<thead>
<tr>
<th>To choose a menu option using the mouse</th>
<th>To choose a menu option using the keyboard</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Click on a menu from the menu bar.</td>
<td>1 Press the ALT key to highlight the menu bar.</td>
</tr>
<tr>
<td>Horizon displays a drop-down list of menu options.</td>
<td>2 Press the underlined letter of the menu you want, or use the arrow keys to move through the menu bar, then press ENTER.</td>
</tr>
<tr>
<td>2 Click on the menu option you want.</td>
<td>Horizon displays a drop-down list of menu options.</td>
</tr>
</tbody>
</table>

(For more information on using keyboard shortcuts, see “Shortcut Keys” on page 2-27.)
Overview of the Launcher

Toolbar

The default Horizon toolbar displays near the top of the Launcher window, and includes standard Windows buttons and other buttons that let you change the Launcher workspace. Your toolbar may also include buttons that let you open a Horizon process.

You or your administrator can add new buttons to the toolbar, change the appearance or location of the toolbar, or add a new toolbar. (For instructions, see “Customizing the Toolbar” in the Launcher Configuration Guide.)

This section explains these topics:

- Buttons on the Default Toolbar
- Displaying or Hiding a Toolbar
- Moving a Toolbar

Buttons on the Default Toolbar

These are the buttons on the default toolbar:

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Save Icon]</td>
<td>Save</td>
<td>Lets you save Horizon information to a file.</td>
</tr>
<tr>
<td>![Print Icon]</td>
<td>Print</td>
<td>Lets you print Horizon information.</td>
</tr>
<tr>
<td>![Cut Icon]</td>
<td>Cut</td>
<td>Lets you cut information from a field.</td>
</tr>
<tr>
<td>![Copy Icon]</td>
<td>Copy</td>
<td>Lets you copy information in a field.</td>
</tr>
<tr>
<td>![Paste Icon]</td>
<td>Paste</td>
<td>Lets you paste information in Horizon windows or other application windows.</td>
</tr>
<tr>
<td>![Undo Icon]</td>
<td>Undo</td>
<td>Lets you undo the last change you made in Horizon.</td>
</tr>
<tr>
<td>![Redo Icon]</td>
<td>Redo</td>
<td>Lets you redo the last change that you decided to undo.</td>
</tr>
<tr>
<td>![Toggle Icon]</td>
<td>Toggle Navigation Bar</td>
<td>Lets you hide or display the navigation bar. (For more information on the navigation bar, see “Navigation Bar” on page 2-10.)</td>
</tr>
<tr>
<td>![Toggle Icon]</td>
<td>Toggle Workbook</td>
<td>Lets you hide or display the workbook.</td>
</tr>
</tbody>
</table>
### Chapter 2: Horizon User Interface

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Toggle Diacritic Shortcut Bar]</td>
<td>Toggle Diacritic Shortcut Bar</td>
<td>Lets you hide or display the diacritic shortcut bar. <em>(For more information on using the shortcut bar, see “Using the Diacritic Shortcut Bar” on page 3-16.)</em></td>
</tr>
<tr>
<td>![Toggle Diacritic Button Bar]</td>
<td>Toggle Diacritic Button Bar</td>
<td>Lets you hide or display the diacritic button bar. <em>(For more information on using the button bar, see “Using the Diacritic Button Bar” on page 3-17.)</em></td>
</tr>
<tr>
<td>![Toggle Full Screen]</td>
<td>Toggle Full Screen</td>
<td>Lets you increase the size of the active process window to fill the entire screen. Also lets you decrease the process window to its previous size.</td>
</tr>
<tr>
<td>![Send to]</td>
<td>Send to</td>
<td>Lets you send data from one Horizon process to another. <em>(For more information, see “Sending Data to Another Process” on page 3-9.)</em></td>
</tr>
<tr>
<td>![About]</td>
<td>About</td>
<td>Lets you view connection information (such as the server and database you are currently accessing) and the version numbers for your Horizon application and database. <em>(For information on accessing a different server or database, see “Logging In to and Out of Horizon” on page 1-10.)</em></td>
</tr>
<tr>
<td>![Help]</td>
<td>Help</td>
<td>Lets you view the online help for a Horizon process window.</td>
</tr>
</tbody>
</table>
Displaying or Hiding a Toolbar

You can choose to display or hide a toolbar. (For example, if you use a toolbar only occasionally, you may want to hide it and then redisplay it when you are ready to use it.)

To display or hide a toolbar

1. Log in to Horizon.
2. Right-click anywhere in the Horizon workspace. Horizon displays a right-click menu:

   ![Customize Launcher]

   If a toolbar currently displays, the menu shows a checkmark.

3. Choose the name of the toolbar that you want to display or hide. Horizon hides or displays the toolbar.

Moving a Toolbar

By default, the main toolbar displays near the top of the Launcher window, directly below the menu bar. You can move the main toolbar, or any custom toolbar, to any location on your computer’s desktop.

To move a toolbar

1. Log in to Horizon.
2. Click on the left side of the toolbar:

   ![Click here to move the toolbar]

   The title bar shows the name of the toolbar.

3. Drag the toolbar to where you want to place it.

   If you move the toolbar directly to the right or left, the toolbar stays in a single row in the toolbar space. If you move the toolbar to the Launcher workspace or your computer’s desktop, the toolbar buttons display in a separate dialog box:
Navigation Bar

The navigation bar is a tree menu of folders. Each folder contains a group of related Horizon processes. Here is an example of the navigation bar, showing the default processes for the Searching folder:

The processes that display on the navigation bar depend on the processes that your system administrator has allowed you to access, and whether your launcher environment is set up to display those processes. (For instructions on customizing the navigation bar, see the Launcher Configuration Guide.)

You can choose whether to display or hide the navigation bar, and choose where it displays in the Launcher workspace.

This section explains these topics:

- Displaying or Hiding the Navigation Bar
- Moving the Navigation Bar

Displaying or Hiding the Navigation Bar

Horizon lets you show or hide the navigation bar. When the navigation bar is visible, you can browse through the navigation bar tree to find the folders and processes that you want. When the navigation bar is not visible, you have more room in the Horizon workspace for other processes.

To display or hide the navigation bar

1. Log in to Horizon.

2. Choose View, Navigation Bar, or click the Toggle Navigation Bar button in the default toolbar.
   Horizon displays or hides the navigation bar.
Moving the Navigation Bar

By default, the navigation bar displays on the left side of the Launcher workspace. You can move the navigation bar and resize it as you would other windows, but it remains inside the Launcher window.

To move the navigation bar

1. Log in to Horizon.
2. Click on the top of the navigation bar.
3. Drag the navigation bar to where you want to place it in the Launcher window.

The navigation bar now displays in a dialog box:

To move the navigation bar to another place in the Launcher window, click the title bar, then drag the navigation bar into place.
Workspace

The workspace displays open Horizon process windows. By default, Horizon opens each new record or window in a cascade view:

Instead of this cascade view, you can choose to have Horizon position all open windows horizontally or vertically. Or you can choose to display just some of the windows that are currently open.

At any time, you can change the size of a window, or move a window to another location on the Launcher workspace.

To position windows in the workspace

1. Log in to Horizon.
2  Choose one of these options:

<table>
<thead>
<tr>
<th>To do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display all open windows or records so that you can see the top portion of each window:</td>
<td>Choose <strong>Window, Tile Horizontally</strong>.</td>
</tr>
<tr>
<td>Display all open windows or records so that you can see the left portion of each window:</td>
<td>Choose <strong>Window, Tile Vertically</strong>.</td>
</tr>
</tbody>
</table>

*The active window's title bar displays in color.*
### To do this

Choose which open windows or records you want to display, and whether they will display horizontally or vertically:

1. **Choose Window, Smart Tile.**
   Horizon displays the Smart Tile dialog box:

   ![Smart Tile Dialog Box](image)

   1. Click on each window you want to display.
   2. Do one of these options:
      - To display the windows horizontally, click **Horizontal**.
      - To display the windows vertically, click **Vertical**.

2. **Choose Window, Cascade.**

   Display all open windows or records so that the active window is in front:

   The edge and title bar of other windows display behind the active window.
Overview of the Launcher

<table>
<thead>
<tr>
<th>To do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change the size of a window.</td>
<td>1 Click on the side or corner of the window. 2 Drag until the window is the size you want.</td>
</tr>
<tr>
<td>Move a window to another location in the Launcher workspace.</td>
<td>1 Click on the title bar of the window. 2 Drag the window to the new location you want.</td>
</tr>
</tbody>
</table>

**Workbook**

By default, Horizon displays a set of tabs at the bottom of the Launcher—one tab for each open window:

![Workbook](image)

Horizon displays one tab for each open window. You can click on a tab to move a window to the front of the screen.

This workbook format lets you easily move from one open window to another by clicking on the tabs.

You can choose whether to hide or display the workbook. (For example, you may want to hide the workbook if your monitor is small and you want more space in your Launcher workspace.)

**To display or hide the workbook tabs**

1. Log in to Horizon.

2. Choose **View, Workbook**, or click the Toggle Workbook button in the default toolbar.

   Horizon displays or hides the workbook tabs.
Overview of Horizon Process Windows

The basic windows that display in Horizon are similar for most processes. (For example, they all include a menu bar and toolbar.) Most processes also include Search, List, and Edit windows that let you find, view, and edit records on the Horizon system.

This section explains these topics:

- Search Windows
- List Windows
- Edit Windows

Search Windows

Horizon search windows let you search for records in a database. This is an example of a search window that lets you search for borrowers:

Search indexes

Search prompt

Search field

Command buttons

Search windows share these features:

- **Search Indexes.** Let you choose the index, or search option, you want to search on the database.

- **Search prompt.** Briefly explains what types of terms to enter that correspond to the search index you choose. The prompt may include examples of search terms.

- **Search field.** Lets you enter the text that you are searching for. (For example, you can enter the borrower name 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.

**NOTE**

For more information on additional types of search windows and instructions on using search windows to complete a search, see the “Searching” chapter.
List Windows

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

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.** Displays the total number of records Horizon found from your search. If there are a large number of records, Horizon displays the first 30 records. Click Resume to display additional records.
- **Display field.** Displays the status of your search (for example “search complete”).

List windows may include other buttons, such as these:

- **Display button.** Lets you change what columns display, the label and width of columns, and the order they display in. (For more information, see “Changing the Columns in a List Window” on page 2-18.)
- **Sort button.** Lets you change the order in which the columns display. (For more information, see “Sorting a List Window” on page 2-21.)
- **Limit button.** Lets you limit or narrow your search results to meet certain criteria. (For more information, see “Limiting a Titles List” on page 4-22.)
- **Edit button.** Lets you edit an item in the list.
This section explains these topics:

- Changing the Columns in a List Window
- Sorting a List Window
- Choosing Items from a List

**Changing the Columns in a List Window**

If you want to, you can temporarily change the columns that appear in a list window so you can see the information that is the most useful to your current task. (For example, in Acquisitions, you can display the type of each statement, such as Invoice, Credit, Refund, and so forth.)

Here is a sample 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.

Your changes to a list window remain until you close that process window. (To change the display more permanently, see the “Horizon Views” chapter of the *System Administration Guide.*)
To change the columns in a list window

1. Access the list window that contains the columns you want to change.
   (For instructions on accessing a process, see “Starting a Horizon Process” on page 3-3.)

2. Click Display.
   Horizon displays a window that lets you change columns. Here is an example of a window for an Acquisitions list window:

   ![Set columns and properties for display window](image)

   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 highlight or unhighlight a column, click the column name.

   **NOTE**
   If you choose to display too many columns, users may need to resize the list window to be able to view all the columns.

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

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Enter the position you want to assign to the column.</td>
</tr>
<tr>
<td></td>
<td>(For example, enter “1” to display the column in the left-most position, “2” for the second position from the left, and so on.)</td>
</tr>
<tr>
<td>Width</td>
<td>Enter the number of characters you want to display in the column.</td>
</tr>
<tr>
<td></td>
<td>(For example, enter “20” to display up to 20 characters of text in the column.)</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>If you choose to display too many columns in this list window, the text in your columns may wrap to the next line. To prevent the text from wrapping, you can enter a small number of characters to keep the width of your columns small.</td>
</tr>
<tr>
<td>Label</td>
<td>Enter the name you want to assign the column.</td>
</tr>
<tr>
<td>Right Justify</td>
<td>Mark this box to right-justify the text in the column.</td>
</tr>
</tbody>
</table>
### In this field | Do this
---|---
**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 currency column, Horizon displays “usd” for United States dollars.)
- Mark **description** to display a description of the code.
  (For example, if you display a currency column, Horizon displays “United States Dollar.”)

**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.
Sorting a List Window

You can sort a list by any of the columns displayed in a list window. (For example, you can sort a list of book titles by their publication dates.) Here is a sample window:

To sort a list window

1. Click Sort in the list window.
   Horizon displays a dialog box showing the default sort order for the List window. Here is an example:

   ![Sort Options Dialog Box]

   You can sort by one or more of the options listed here. (The list you are sorting determines which options you can sort by.)

2. Click the first option you want to sort by.
   (For example, if you want Horizon to display entries in order by year, click Pub Date.) Horizon moves the sort option you chose to the top of the list in the dialog box.

3. Click additional options to sort by, in the order in which you want the entries to be sorted.
   (For example, if you clicked Pub Date as the first sort option, you can click Title as the second sort option to display titles published in the same year alphabetically by title.) As you choose an option, Horizon moves the option toward the top of the list in the dialog box.

NOTE

If the list does not display the fields you want to sort by, you can add them. (For instructions, see “Changing the Columns in a List Window” on page 2-18.)
4 If you want, mark the Descending sort box to sort the list from last to first (for example, from Z to A or from the year 2000 to 1900).

5 Click OK to save your changes and return to the list window.

**NOTE**

The sort remains in effect only while you are in the list window. Once you close the window, the default sort fields return.

Choosing 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 where you can view, edit, or process the items. (For example, you can choose an item from a list of titles and view details about that title.) You can also choose items from a list to move them from one process to another. (For instructions, see “Sending Data to Another Process” on page 3-9.)

This sample list window shows multiple chosen items:

```
1. Architecture, Computers in architecture & architectural design – Data processing
2. Related Heading: Computers
3. Related Heading: Computers – Access control
```

**NOTE**

Some Horizon windows let you use the standard Microsoft Windows SHIFT and CTRL keys to choose multiple items in a list.
Overview of Horizon Process Windows

To choose items from a list

1. Do one of these options:

<table>
<thead>
<tr>
<th>To choose a single item</th>
<th>To choose multiple items with the mouse</th>
<th>To choose multiple items with the keyboard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Double-click the item you want. Horizon highlights the item and moves it to the next window as if you had clicked the button in the bottom-left corner of the list window.</td>
<td>Move the mouse to the item you want to choose. Highlight the item or items you want by clicking once on each item</td>
<td>Use the arrow keys to move the selector arrow to the item you want. Press the space bar on an item you want, then use the arrow key to move to the next item you want and click the space bar again. Horizon highlights each item you choose.</td>
</tr>
</tbody>
</table>

**NOTE**

You can also choose items by entering their numbers in the Selection field (for example, “1-3, 7, 10-15”).

2. Click the button for the action you want.

(For example, click the Show Titles button.) This will start the action for the items you chose.
Edit Windows

Horizon edit windows let you update your database. You can open an edit window from a list window. Here is an example of an edit window used for editing borrower information:

![Edit Window Example]

Edit windows share these features:

- **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”.)

- **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. For more information, see “Codes” on page 2-25.)

- **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.) (For more information, see “Groups” on page 2-26.)

- **Check box.** (Not shown) Use this to turn an option on or off. Horizon displays an “X” in the box if an option is turned on.

- **Required fields.** Horizon displays an asterisk next to all required fields in all windows throughout the system. This feature helps you easily see those fields required to save the record.

- **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.

This section explains these topics:

- Codes
- Groups
Codes

Certain fields in edit windows accept only predefined values or codes. When you click the Codes button, Horizon displays a list of valid options in a code lookup window.

Here is an example of the code lookup window from the Edit Statement window in Acquisitions:

- **Code field.** Displays the code you choose 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 and closes the code lookup 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 code you choose, if you are authorized.
Chapter 2: Horizon User Interface

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 a group:

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

  **IMPORTANT**

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

- **Field.** Lets you add or edit text.

- **Radio button.** 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.

Using Shortcut Keys and Right-click Menus

In most cases, the Horizon user’s guides explain only one way to complete a task. However, you may be able to access commands, options, or processes in a variety of ways.

From within the Launcher and Horizon windows, the quickest way to access a task may be to use shortcut keys or to choose options on a right-click menu.
This section explains these topics:

- Shortcut Keys
- Right-click Menus

**Shortcut Keys**

Shortcut keys let you press a combination of keys on your keyboard to quickly access a feature or complete an action. You can use several types of shortcut keys in Horizon, including these:

- **Navigation bar shortcuts.** You can press F9 and a shortcut key to activate a process the navigation bar. You or your system administrator must set up these shortcuts. (For more information, see “Using the Keyboard to Start a Process” on page 3-5.)

- **Diacritic shortcuts.** You can press F7 and a shortcut key to enter a diacritic or special character. You or your system administrator must set up these shortcuts. (For more information, see “Using Diacritic Shortcuts from the Keyboard” on page 3-15.)

- **Menu option shortcuts.** You can press ALT and shortcut keys to access the menu bar and any submenus or menu options. The shortcut key is the underlined letter in the menu option:

  Press ALT, the underlined letter in the menu name, and then the underlined letter in the menu option.

  To access some menu options, you can press a function key.

  (For example, in Circulation, you can press ALT+B to open the Borrower menu. Then, with the Borrower menu open, press F to access the Find Borrower menu option.)
• **Function keys.** For some menu options, you can also press a function key. (For example, in Circulation, you can press F5 to access the New Borrower menu option.) From anywhere in Horizon, you can press these function keys to access a certain window or command:

<table>
<thead>
<tr>
<th>Press this function key</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>F2</td>
<td>Open the main search window, or open a specific type of search window, depending on where you are in the software. (For more information, see “Doing a Basic Search” on page 4-12.)</td>
</tr>
<tr>
<td>F7</td>
<td>Enter a shortcut for a diacritic or a composed string of characters. (For more information, see “Using Diacritic Shortcuts from the Keyboard” on page 3-15.)</td>
</tr>
<tr>
<td>F9</td>
<td>Activate the navigation bar, or enter the shortcut for a process in the navigation bar. (For more information, see “Using the Keyboard to Start a Process” on page 3-5.)</td>
</tr>
<tr>
<td>F10</td>
<td>Open the Send to menu. (For more information, see “Sending Data to Another Process” on page 3-9.)</td>
</tr>
</tbody>
</table>

• **Standard Windows shortcuts.** You can use most standard Windows shortcut keys that you can use in other Windows programs. (For example, you can press CTRL+C to copy the contents of a field and CTRL+V to paste the contents in another field or another Windows program.) Here is a list of the Windows shortcut keys that you can use in Horizon:

<table>
<thead>
<tr>
<th>Press this key combination</th>
<th>To invoke this command</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL+A</td>
<td>Select all text</td>
</tr>
<tr>
<td>CTRL+C</td>
<td>Copy</td>
</tr>
<tr>
<td>CTRL+F</td>
<td>Find</td>
</tr>
<tr>
<td>CTRL+N</td>
<td>New</td>
</tr>
<tr>
<td>CTRL+O</td>
<td>Open</td>
</tr>
<tr>
<td>CTRL+P</td>
<td>Print</td>
</tr>
<tr>
<td>CTRL+V</td>
<td>Paste</td>
</tr>
<tr>
<td>CTRL+X</td>
<td>Cut</td>
</tr>
<tr>
<td>CTRL+Y</td>
<td>Redo</td>
</tr>
<tr>
<td>CTRL+Z</td>
<td>Undo</td>
</tr>
<tr>
<td>DEL</td>
<td>Delete</td>
</tr>
<tr>
<td>CTRL+DEL</td>
<td>Clear an entire field</td>
</tr>
<tr>
<td>CTRL+ESC</td>
<td>Switch to the Start menu</td>
</tr>
<tr>
<td>CTRL+F</td>
<td>Close</td>
</tr>
</tbody>
</table>
Right-click Menus

Right-click menus let you quickly access the commands, options, or features that apply to the current window or process. You can right-click on most windows and fields in Horizon to display a menu of options that apply to that window or field.

For example, you can right-click on these parts of the software to display a list of menu options:

- **Launcher workspace or toolbar.** Right-clicking on the Launcher workspace or a toolbar lets you choose to display or hide a toolbar. If your system administrator allows it, you may also be able to access the Customize Launcher window:

  ![Customize Launcher](image)

  If a toolbar currently displays, the menu shows a checkmark.

- **Navigation bar.** Right-clicking on the navigation bar lets you choose whether to hide the navigation bar, to show menu shortcuts, and so forth. If your system administrator allows it, you may also be able to customize your navigation bar:

  ![Customize Navigation Bar](image)

<table>
<thead>
<tr>
<th>Press this key combination</th>
<th>To invoke this command</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL+F6</td>
<td>Next window</td>
</tr>
<tr>
<td>CTRL+SHIFT+F6</td>
<td>Previous window</td>
</tr>
<tr>
<td>ALT and the space bar</td>
<td>Display the application system menu</td>
</tr>
<tr>
<td>ALT and a hyphen ( - )</td>
<td>Display the active window’s system menu</td>
</tr>
<tr>
<td>ALT+ESC</td>
<td>Switch to the next application</td>
</tr>
<tr>
<td>ALT+F4</td>
<td>Close application</td>
</tr>
<tr>
<td>ALT+PRINT SCREEN</td>
<td>Copy an image of the active window to a clipboard</td>
</tr>
<tr>
<td>ALT+TAB</td>
<td>Switch between applications</td>
</tr>
<tr>
<td>SHIFT+ALT+TAB</td>
<td>Switch to the previous application</td>
</tr>
<tr>
<td>PRINT SCREEN</td>
<td>Copy an image of the entire screen to the clipboard</td>
</tr>
</tbody>
</table>
• **Process windows.** Right-clicking on a process window lets you access some of the options or features available from within that process. For example, in the Checkin window, you can change the checkin date, exempt fines, and so forth:

![Process window options]

• **Fields in a window.** Right-clicking in a field lets you cut, copy, or paste text; look up a code; and so forth:

![Field options]
Working with Grids and Forms

Some Horizon processes use a “grids and forms” interface. (This type of interface is sometimes called a display context interface.) This interface lets you complete records more quickly and let you use tools that can help your data-entry efficiency. If a process uses the grids and forms interface, the navigation bar shows this grid icon: 

Here is an example of some Cataloging processes that use grids and forms for the user interface:

![Diagram showing processes that use grids and forms interface]

This section explains these topics:

- About Grids and Forms
- Viewing Basic Information about a Grid or Form
- Adding a Row to a Grid
- Sorting the Contents of a Grid
- Filtering the Contents of a Grid
- Searching or Replacing the Contents of a Grid
- Temporarily Changing the Display of a Grid
- Refreshing the Information in a Grid
- Exporting the Contents of a Grid or Form
- Deleting a Row from a Grid
About Grids and Forms

Here is how grids and forms work together:

- **Grids.** A “grid” is a two-dimensional display consisting of rows and columns. Each row in a grid represents a specific record, and each column in the grid stores a piece of information (field) in that record. A grid is simply a way of organizing similar data together.

  Here is an example of a grid for Syntax and Validation setup in Cataloging (which lets cataloging staff define valid cataloging types, tags, subfields, and elements in MARC records):

  Each grid has a Grid options menu when you click here. This menu lets you sort, filter, search, and change the display of a grid, as well as other options. This button may or may not have a grid icon on it.

  Each column in the grid represents a separate field on the record.

  You can edit some fields by clicking in them and typing new information.

  If the row has an arrow and ellipses, then the row has a form to edit fields.

  You can edit some fields by clicking in the field and choosing an option from a drop-down list.

  Each row in this grid is a separate record. You can complete records more efficiently when they are listed and editable like this.

  If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for the current information.

- **Forms.** Forms expand a single row (record) from the grid into greater detail. A form might display read-only information or let you enter new information that defines the record with which you are working. A form can contain regular data fields or may also contain grids of information.
Here is an example of a form for the MARC21 bib record cataloging type standard grid:

As you use grids and forms, some tasks work essentially the same, no matter what process you are working with.

You can use these buttons as you complete grids and forms. (To save any of your changes, you must click in any row in which you are not working and click Save. Clicking in another row enables the Save button):

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrowhead</td>
<td>Indicates the active or selected row.</td>
<td></td>
</tr>
<tr>
<td>Arrowhead and ellipsis</td>
<td>Indicates that a form exists for this previously completed row. You can edit the indicated record in this form by double-clicking this button.</td>
<td></td>
</tr>
<tr>
<td>Asterisk</td>
<td>Lets you add a row to the grid. You can add a new record by completing the fields.</td>
<td>Note: If the grid allows you to add rows, Horizon displays the asterisk button or asterisk and ellipsis button as the last button on the window. You may need to use the scroll bar to find it.</td>
</tr>
<tr>
<td>Asterisk and ellipsis</td>
<td>Lets you add a row to the grid by opening a form. You can add a new record by completing the fields.</td>
<td></td>
</tr>
</tbody>
</table>

These fields are columns for the MARC21 bib record cataloging type standard grid.

These tabs contain other columns in the MARC21 bib record cataloging type standard grid.
Chapter 2: Horizon User Interface

Viewing Basic Information about a Grid or Form

You can view basic information about a grid or form, such as the table in the Horizon database that provides data for the grid or form, and whether you can add or delete rows to a grid. Horizon lets you only view the information, not change it.

To view basic information about a grid or form

1. Start a process that uses grids or forms.
   Horizon displays the grid for the process you chose.

2. Do one of these options:

<table>
<thead>
<tr>
<th>To do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>View the information about a grid</td>
<td>1 Click the <strong>Grid options menu</strong> box ( ). 2 Choose <strong>About this Grid</strong>.</td>
</tr>
<tr>
<td>View the information about a form</td>
<td>1 Find the form you want. 2 Right-click on the form. 3 Choose <strong>About this Form</strong>.</td>
</tr>
</tbody>
</table>
Horizon displays the Information about this DC window:

3 View the information about the grid.

### Adding a Row to a Grid

If you want to do so, you can add a row to a grid.

**To add a row to a grid**

1 Start a process that uses grids or forms.
   Horizon displays the grid for the process you chose.

2 Do one of these options:
   - Complete the last row of a grid and save the grid.
   - Click the Grid options menu box ( ), and choose Add New Row.
     Horizon adds a new row to the grid, indicated by a pencil and ellipses.
   - In the last blank row in the grid, double-click in the far-left row header field.
     Horizon displays a blank form for you to complete.
   - If you want to add a row by copying an existing row, highlight the row you want to copy, click the Grid options menu box ( ), and choose Copy Selection.

**NOTE**
Horizon copies over the information from the row you copied only if you marked the Carryover box for each column that you wanted to copy. (For instructions on accessing this box, see “Temporarily Changing the Display of a Grid” on page 2-41.)
If you have not already done so, complete the information for the row.

Click in another row and save your changes.

---

**Sorting the Contents of a Grid**

You can sort the contents of a grid by any of the columns displayed in the grid window. (For example, you can sort a list of MARC tags in Cataloging’s Syntax and Validation grid by the tags’ labels or descriptions.)

**To sort the contents of a grid**

1. Start a process that uses grids.
   - Horizon displays the grid for the process you chose.

2. Do one of these options:

<table>
<thead>
<tr>
<th>To sort this way</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using one column</td>
<td>Double-click the column heading by which you want to sort.</td>
</tr>
</tbody>
</table>
   | Using multiple columns  | 1. Double-click the column heading you want to use as the primary sort column.  
                               2. Hold down the **CTRL** key and double-click the column heading you want to use as a secondary sort column. |

Horizon displays an arrow in the column heading to indicate which column it used to sort the information. (If you are sorting using multiple columns, Horizon displays numbers in the column headings to indicate the order in which it is sorting information.)
Here is an example of Horizon sorting the MARC tags grid in the Cat Type form for Cataloging’s Syntax and Validation grid:

In this example, the Description column is used as the primary sort (1) and the Tag column is used as the secondary sort (2).

NOTE

The sort remains in effect only while the grid is open. Once you close the grid, Horizon reverts to the default sort order.
Filtering the Contents of a Grid

You can use SQL statements to filter the contents of a grid to return contents that match certain criteria. (For example, if you are interested only in certain MARC tags in Cataloging’s Syntax and Validation grid, you can filter the grid to display only those MARC tags with that criteria.)

In order to filter the contents of a grid or form, you must understand basic SQL statements. (For more information about SQL statements, see your Sybase or Microsoft documentation. For more information about using the “where” clause, see “Using SQL Statements in the Table Editor” in the “Horizon Table Editor” section of the “Getting Started” chapter of the System Administration Guide or talk to your system administrator.)

Some grids have default filters that cannot be changed. In addition, your system administrator may have previously set up restrictions by which the grid may be filtered. (For example, the system administrator can set up the grid to display specific MARC tags.) If a filter has been set up previously, any filter you create will not override the filter but act as a secondary filter.

This section explains these topics:

- Filtering the Contents of a Grid
- Turning Off a Filter in a Grid

To filter the contents of a grid

1. Start a process that uses grids or forms.
   Horizon displays the grid for the process you chose.

2. Click the Grid menu options button ( ).

3. Choose Filter Grid.
   Horizon displays the Select filter for grid contents window:

4. Enter the SQL statement you want to use to filter the rows, not including “where”.
   You should not include “where” in your SQL statement, since Horizon automatically adds it to the statement when you click OK.
Here is an example:

<table>
<thead>
<tr>
<th>To filter a grid using this</th>
<th>Do this</th>
</tr>
</thead>
</table>
| The location column        | Enter this statement, including spaces and quotation marks:  
  location = “location name”  
  For example, enter this statement:  
  location = “main” |

5 Click OK.
Horizon displays only the rows that match the “where” clause parameters.

**To turn off a filter in a grid**

Do one of these options:

- If you are finished with your task, close the grid that you filtered.  
  When you open the grid again, the contents are not filtered.
- If you want to clear the filter without closing the grid, follow these steps:

1 Click the Grid menu options button ( ) again.
2 Choose Filter Grid.
   Horizon displays the Select filter for grid contents window.
3 Delete the SQL statement you entered.
4 Click OK.
   Horizon redisplays all the rows in the grid.
Chapter 2: Horizon User Interface

Searching or Replacing the Contents of a Grid

You can search the contents of a grid. If you want to do so, you can replace the information you find, or continue searching for other information.

(For example, if you are in Cataloging’s Syntax and Validation Linking tab and have one or more See Tag or a See Also Tag fields that you want to find or change, you can do so.)

To search or replace the contents of a grid or form

1. Start a process that uses grids or forms.
   Horizon displays the grid for the process you chose.
2. Click the Grid options menu button ( ).
3. Choose Find/Replace Grid.
   Horizon displays the Find/Replace window:

   Horizon displays the Find/Replace window:

<table>
<thead>
<tr>
<th>Find Cell Containing</th>
<th>In Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the text you want to search for.</td>
<td>Choose the column you want to search.</td>
</tr>
<tr>
<td>If you want to search a column containing check boxes, enter “0” (zero) to search for unmarked check boxes or “1” (one) to search for marked check boxes.</td>
<td></td>
</tr>
</tbody>
</table>

4. Complete the fields as necessary:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find Cell Containing</td>
<td>Enter the text you want to search for.</td>
</tr>
<tr>
<td>In Column</td>
<td>Choose the column you want to search.</td>
</tr>
<tr>
<td>Replace Cell Text With</td>
<td>If necessary, mark this box and enter the text you want to use as a replacement.</td>
</tr>
<tr>
<td>Case Sensitive ?</td>
<td>Mark this box if you want the search to look for text with the exact capitalization you have specified.</td>
</tr>
<tr>
<td>Up/Down</td>
<td>Click one of these to change the direction of your search.</td>
</tr>
</tbody>
</table>

5. Click Find Next.
If Horizon finds a field that matches your searching criteria, Horizon displays an arrow and ellipsis button in the left-most column next to the row. It also highlights the column you are searching. (If no field matches your criteria, Horizon sounds a beep.)

6 Do one of these options:
   • To change the column’s information, click Replace.
   • To continue searching without changing the column’s information, click Find Next.

7 Click in another row and save your changes.

Temporarily Changing the Display of a Grid

When you open a grid or form, some columns appear by default. If you want to do so, you can temporarily change how these columns appear and function. That way, you can see the column information that is most useful for your current task.

To change the display, you can hide columns that currently display or display additional columns that do not currently appear. You can also change the edit properties for these columns. (For example, you can rearrange the order in which columns appear in the grid, or you can determine whether the information in the column is editable or always uses a default.)

The changes remain in effect only while the grid is open. Once you close the grid, Horizon reverts to the default columns.

To temporarily change the display of a grid

1 Start a process that uses grids or forms.
   Horizon displays the grid for the process you chose.

2 Click the Grid options menu button ( ).

3 Choose Change Grid Layout.
Horizon displays the Grid Configuration Options window.

You can use these column names to filter the grid. (For more information, see “Filtering the Contents of a Grid” on page 2-38).

4 In Grid Columns, highlight the column whose properties you want to change.

5 Complete the fields as necessary:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enabled</td>
<td>This field shows you whether the column is enabled or disabled.</td>
</tr>
<tr>
<td>Required</td>
<td>This field shows you whether Horizon requires you to enter information in this column before the record can be saved.</td>
</tr>
</tbody>
</table>
| Hidden        | Do one of these options:  
  - If you do not want this column to display, mark this box.  
  - If you want this column to display, make sure this box is not marked. |
| Carryover     | Mark this box to use this column’s information in additional rows you create in this grid.  
  The column’s information is used only if you use the Copy Selection grid menu option to create a new row. |
Working with Grids and Forms

### Refreshing the Information in a Grid

When you open a grid, Horizon displays a snapshot of data from your Horizon database in the grid. If you or someone else changes information in the grid, the grid may not display the changes. To see the changes, you can close and reopen the view containing the grid, or you can refresh the information in the grid.

#### To refresh the information in a grid

1. Start a process that uses grids or forms.
   Horizon displays the grid for the process you chose.

2. Click the **Grid options menu** button ( ).

3. Choose **Requery Grid**.
   Horizon displays the updated grid.

---

**In this field** | **Do this**
--- | ---
**Default Value** | Enter the default data that you want to appear in a column when you add a new row to the grid. This is useful if you are creating multiple rows that use the same information in certain fields.

**Editable** | This field shows whether you can edit this column. If **Always** is marked, you can edit the column any time. If **Only on Add** is marked, you can edit the column only when adding new record.

**Reset Grid Configuration from Database** | Click this button if you want to change the display back to the default.

**Up/Down** | Click one of these to change the order in which the column displays.

---

**NOTE**
Your display changes remain in effect only while the grid is open. Once you close the grid, Horizon reverts to the default settings.
Exporting the Contents of a Grid or Form

You can export the contents of a grid or form, or even the contents of the entire source table for the grid or form. (For example, you can export the contents of the grid to another database or to a backup source.) You can choose whether the information will be exported into a comma-separated value file, a text file, or as a SQL insert script.

To export the contents of a grid or form

1. Start a process that uses grids or forms.
   Horizon displays the grid for the process you chose.
2. Do one of these options:

<table>
<thead>
<tr>
<th>To do this</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Export information in a grid      | 1. To highlight more than one row or column at a time, press CTRL and click on each row or column.  
                                           2. If you want to choose certain rows or columns of the grid to export, click on each row or column to highlight it.  
                                           3. Click the Grid options menu button ( ). |
| Export information in a form      | 1. Find the form you want.  
                                           2. Right-click on the form. |

3. Choose Export.
   Horizon displays the Export to File window:
Complete these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export file name</td>
<td>Enter or browse to the path where you want to export the file.</td>
</tr>
<tr>
<td>Export codepage</td>
<td>Choose the codepage of the database to which you want to export. (For more information on the codepage, see your database’s SQL documentation.)</td>
</tr>
<tr>
<td>Row Selection</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• To export all the rows in the table, choose All Table Rows.</td>
</tr>
<tr>
<td></td>
<td>This option exports all information for all of the rows in a table, regardless of what Horizon displays in the grid.</td>
</tr>
<tr>
<td></td>
<td>• To export all of the rows displayed in the grid, choose All Grid Rows.</td>
</tr>
<tr>
<td></td>
<td>This option exports every row that Horizon currently displays in the grid.</td>
</tr>
<tr>
<td></td>
<td>• If you highlighted certain rows in the grid, choose Selected Grid Rows.</td>
</tr>
<tr>
<td></td>
<td>This option exports only the rows that you highlighted in the grid.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>If you use this option, you can also export selected columns by also highlighting the columns you want to export and clicking Selected Grid Columns.</td>
</tr>
<tr>
<td></td>
<td>• To use an SQL statement to choose specific rows to export, choose Select Table Rows ‘where’, then enter the conditions by which you want to limit the list.</td>
</tr>
<tr>
<td></td>
<td>You can use Boolean operators to enter two or more criteria. If you do not enter a “where” statement, Horizon exports the entire table.</td>
</tr>
</tbody>
</table>
### Column Selection

**Do one of these options:**

- **To export all the columns in the table,** choose **All Table Columns.**
  
  This option exports all information for all of the columns in a table, regardless of what Horizon displays in the grid.
  
  - **To export all the currently visible columns in the grid,** choose **All Grid Columns.**
    
    This option exports every column that Horizon currently displays in the grid. You may need to unhide certain columns in the grid that may be hidden.
  
  - **If you highlighted certain columns in the grid,** choose **Selected Grid Columns.**
    
    This option exports only the columns that you highlighted in the grid.

  **NOTE**

  If you use this option, you can also export selected rows by also highlighting the rows you want to export and clicking **Selected Grid Rows.**

- **If you want to choose from a list of columns to export,** choose **Select Columns,** then choose the columns you want to export and click **OK.**

### Export File Type

**Do one of these options:**

- **If you want to export the information into a comma-separated value file (.csv),** choose **Comma-Delimited (.csv).**
  
  This option exports the complete information, regardless of length.
  
  - **If you want to export the information into a text file (.txt) with fixed-length fields,** choose **Length-Delimited.**
    
    This option exports the information up to a certain length; therefore, some of the information may be cut off in the exported file.
  
  - **If you want to use an SQL script to export the information to another database,** choose **SQL Script (.sql),** then continue with step 5.

### Include Column Header

**If you chose a Comma-Delimited (.csv) or Length-Delimited (.txt) export file type and if you want to include column headers with the exported information, mark this box.**
5 If you chose **SQL Script (.sql)** at the Export File Type field *and* want to enter specific export criteria, complete these fields; otherwise, continue with step 6:

**NOTE**

Even if you chose SQL Script (.sql) as the Export File Type, you do not need to complete these fields. If you do not complete these fields, Horizon uses the default settings for these fields.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add ‘use database’</td>
<td>If necessary, enter the name of the database into which you want to insert the SQL script. This is the SQL name of the database to which you want to export.</td>
</tr>
</tbody>
</table>
| Date format mm-dd-yyyy     | Do one of these options:  
  - If your database uses the date format mm-dd-yyyy, mark this box.  
  - If your database uses the default date format yyyy-mm-dd, leave this box unmarked.                                                                 |
| Use ‘;’ delim              | Do one of these options:  
  - If your SQL processor uses a semicolon ( ; ) to separate SQL statement batches, mark this box.  
  - If your SQL processor does not use a semicolon ( ; ) to separate SQL statement batches, leave this box unmarked. (The export process uses the default separator “go”.)
| Add ‘delete’               | If you want the SQL export process to delete certain pieces of information from the database to which you are exporting before importing the grid information, mark this box.  
  You must then enter the criteria for the pieces of information you want to delete in the Delete ‘where’ field. This helps avoid conflicts with information that is already in the database to which you are exporting. |
| Delete ‘where’             | If you marked the Add ‘delete’ box, enter the “where” clause for the criteria of information that you want to delete, not including “where”.  
  You should not include “where” in your SQL statement, since Horizon automatically adds it to the statement. |
Deleting a Row from a Grid

If you want to do so, you can delete a row from a grid.

**To delete a row from a grid**

1. Start a process that uses grids or forms. Horizon displays the grid for the process you chose.
2. If you want to delete information, highlight the row you want.
3. Do one of these options:
   - Click the **Grid options menu** button ( ), and choose **Delete Selection**.
   - Highlight the row you want to delete and press **DELETE**.
4. Click **Yes** to confirm the deletion. Horizon deletes the row and all of its information from the grid.
5. Click in another row and save your changes.
Basic Tasks

This chapter explains basic Horizon tasks that apply to many different Horizon processes. It explains how to activate a Horizon process and work in the windows within a process. It also explains how to change information for a group of items and how to enter special characters (such as diacritics) in Horizon records.

About Basic Tasks 3-3
Starting a Horizon Process 3-3
Saving Data to a File 3-7
Sending Data to Another Process 3-9
Changing Information for a Group of Items 3-12
Entering Special Characters and Diacritics 3-14
About Basic Tasks

This chapter explains basic tasks that work essentially the same, no matter what Horizon process you are working with. (For example, when a window displays a list of items, you can send an item to another process in a similar way, whether you are using a Cataloging, Circulation, Acquisitions, or Serials process.)

This chapter explains these topics:

- Starting a Horizon Process
- Saving Data to a File
- Sending Data to Another Process
- Changing Information for a Group of Items
- Entering Special Characters and Diacritics

Starting a Horizon Process

The beginning step of most tasks in the Horizon user’s guides tell you to start a process. (For example, you can start a New Search process to search for an item in your library’s catalog.)

You can start a process in a variety of ways. If you prefer to use the mouse, you can click on icons in the navigation bar or on the toolbar. If you prefer to use the keyboard, you can enter shortcut keys.

If the process is already started, but is running in the background of your Horizon Launcher workspace, you can use either the mouse or the keyboard to make a process the active process.

NOTE

Your system administrator can customize your Launcher environment, and may limit which processes you can access and how you can access them.

This section explains these topics:

- Using the Mouse to Start a Process
- Using the Keyboard to Start a Process
- Activating an Open Process Window or Record
Using the Mouse to Start a Process

If you prefer to use the mouse when working in Horizon, you can start a process by clicking on icons.

You can start a process by clicking on the process icon in the navigation bar. (The navigation bar is a tree menu that uses folders to organize the processes that you use in Horizon.) Your system administrator determines which processes are available in your navigation bar.

If your toolbar has been set up to include processes, you can start a process by clicking on a toolbar button. (For instructions on adding a process button to a toolbar, see the “Customizing the Toolbar” chapter of the Launcher Configuration Guide, or talk to your system administrator.)

To use the mouse to start a process from the navigation bar

1. Log in to Horizon.
2. Make sure the navigation bar is showing inside the Horizon workspace.
   
   If you need to display the navigation bar, choose View, Navigation Bar.
3. Click the plus sign (+) next to the folder you want to open.
   Horizon displays any folders and processes in the folder you opened. Here is a sample navigation bar with the Cataloging folder open:

   ![Sample Navigation Bar](image)

4. If necessary, click the plus sign (+) next to any other folder you want to open until you find the process you want to start.
5. Double-click the process that you want.
   
   (For example, if you want to create a new bibliographic record, double-click Create New Bib.)
   Horizon starts the process.
(For more information on using Horizon process windows, see “Overview of Horizon Process Windows” on page 2-16. For more information on doing the task for a specific process, see the appropriate Horizon user’s guide.)

---

### Using the Keyboard to Start a Process

If you prefer to use the keyboard when working in Horizon, you can start a process by pressing function keys and other shortcut keys.

If you or your system administrator has set up shortcut keys for a specific process in the navigation bar, you can start the process by pressing the F9 function key and the specific shortcut key for that process. (For instructions on adding a shortcut key for a process in the navigation bar, see “Setting Up Shortcut Keys to Open Processes” in the “Customizing the Navigation Bar” chapter of the Launcher Configuration Guide, or talk to your system administrator. For information on other types of shortcut keys, see “Shortcut Keys” on page 2-27.)

**NOTE**

You do not need to have the navigation bar open to use the available shortcut keys. You can close the navigation bar and still use the shortcuts to start the processes.

If you do not have shortcut keys set up, you can search for the process in the navigation bar using a Find window.

### Before You Begin

If you have shortcut keys set up, but do not remember the shortcut for the process you want to start, you can view the shortcut in the Shortcut column of the Navigation bar:

![Shortcut column example](image)

If the navigation bar does not display the Shortcut column, you can display it by right-clicking anywhere on the navigation bar, and choosing **Show Menu Shortcuts**. If the shortcuts still do not display, close and reopen the navigation bar folder for the process whose shortcut you want to view.
To use the keyboard to start a process

1. Log in to Horizon.
2. Do one of these options:

<table>
<thead>
<tr>
<th>To use the lead-in key</th>
<th>To use the Find function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Press <strong>F9</strong>.</td>
<td>1 Press <strong>CTRL, F</strong>.</td>
</tr>
<tr>
<td>The lead-in key sets up</td>
<td>Horizon opens the</td>
</tr>
<tr>
<td>the system to accept</td>
<td>Navigator Bar Find</td>
</tr>
<tr>
<td>your next keystroke as</td>
<td>dialog box.</td>
</tr>
<tr>
<td>the code for the</td>
<td>2 In the <strong>Find What</strong></td>
</tr>
<tr>
<td>process.</td>
<td>field, enter part or all</td>
</tr>
<tr>
<td>2 Press the shortcut</td>
<td>of the process name that</td>
</tr>
<tr>
<td>key for the process</td>
<td>you want to look for.</td>
</tr>
<tr>
<td>that you want to start.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 If you want to limit</td>
</tr>
<tr>
<td></td>
<td>your search, do one or</td>
</tr>
<tr>
<td></td>
<td>all of these options:</td>
</tr>
<tr>
<td></td>
<td>• To search for process</td>
</tr>
<tr>
<td></td>
<td>names that match the</td>
</tr>
<tr>
<td></td>
<td>uppercase and lowercase</td>
</tr>
<tr>
<td></td>
<td>letters that you entered,</td>
</tr>
<tr>
<td></td>
<td>mark the <strong>Match case</strong></td>
</tr>
<tr>
<td></td>
<td>box.</td>
</tr>
<tr>
<td></td>
<td>• To search for process</td>
</tr>
<tr>
<td></td>
<td>names that match only</td>
</tr>
<tr>
<td></td>
<td>the whole word you</td>
</tr>
<tr>
<td></td>
<td>entered, mark the **</td>
</tr>
<tr>
<td></td>
<td>Match whole word only**</td>
</tr>
<tr>
<td></td>
<td>box.</td>
</tr>
<tr>
<td></td>
<td>• Choose whether you</td>
</tr>
<tr>
<td></td>
<td>want to search up or</td>
</tr>
<tr>
<td></td>
<td>down.</td>
</tr>
<tr>
<td>4 Click <strong>Find Next</strong>.</td>
<td>Horizon finds the first</td>
</tr>
<tr>
<td></td>
<td>occurrence of your term.</td>
</tr>
<tr>
<td>5 If necessary, click <strong>Find Next</strong> multiple times until you find the process you want.</td>
<td></td>
</tr>
<tr>
<td>6 Double-click the icon of the process.</td>
<td></td>
</tr>
</tbody>
</table>

Horizon starts the process.

(For more information on using Horizon process windows, see “Overview of Horizon Process Windows” on page 2-16. For more information on completing a specific process, see the appropriate Horizon user’s guide.)
Activating an Open Process Window or Record

If you have already started a process, but it is not the active window in the Launcher workspace, you need to make it the active process before you can use it.

You can activate an open process in several ways:

- Choose Window and the number of the open window or record you want to make active.
- Press ALT+F to activate the Window drop-down menu. Then type the number of the open window or record you want to make active.
- If you can see part of the window or record you want to make active, click on the window.
- Press CTRL+F6 to cycle through the open windows.
- If you are in Circulation, press F8 to toggle between the CKI and CKO windows.
- In the workbook at the bottom of the Launcher window, click the tab for the open window or record you want to make active. If the workbook does not display, you can choose View, Workbook to display it. (For more information, see “Workbook” on page 2-15.)

Saving Data to a File

You can save the data in most Horizon lists and report windows to a file. (For more information on saving data to a file for Horizon grids and forms, see “Exporting the Contents of a Grid or Form” on page 2-44.) 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 Acquisitions budget information to a file so you can load the information into a spreadsheet program for further statistical analysis.)

When you save a list to a file, you can specify how you want 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 using a text editor, such as Notepad.

To save data to a file

1. Open the list or report you want to save to a file.
2. Do one of these options:
   - Choose File, Save to File.
   - Choose File, Export Records.
   Horizon displays the Save to a File window.
3. Choose the folder where you want to save the file.
   The default location is the folder where your Horizon software is installed. You can also create a new folder.
   Make sure the folder appears in the Save in field.
4. Enter a name for the file in the File name field.
5. Click Save.
Chapter 3: Basic Tasks

Horizon prompts you to set up the file format:

---

6 In the **Format** group, mark one of these options to choose how you want Horizon to separate the columns of text in the file:

- **Columns Separated by Tabs.** Mark this option if the application in which you plan to open the file requires columns of data to be separated by tabs.

- **Columns Separated by Commas.** Mark this option if the application in which you plan to open the file requires columns of data to be separated by commas. (Spreadsheet applications usually require that columns of data be separated by commas.)

- **As Displayed.** Mark this option if you want to open the file directly using a text editor, such as Notepad. Horizon saves the text with the same number of spaces shown on the screen.

7 If the application in which you plan to open the file requires quotes around the text fields, mark **Put Quotes on Each Column.**

   This option is not available if you choose As Displayed in the Format group.

8 In the **Headings** group, mark one of these options to choose how you want Horizon to save column names in the file:

- **None.** Mark this option to not include column names.

- **Use Database Names.** Mark this option to use the column names that are used in the Horizon database, instead of the names displayed in the List window (for example, “unit_price” instead of “Unit Price”).

   This option is not available if you choose As Displayed in the Format group.

- **As Displayed.** Mark this option to use the column names that are displayed in the List window (for example, Title, Unit Price, and so on).

9 Click **OK.**

   Horizon saves the file.

   You can open the file using a text editor, such as Windows Notepad. (For more information, see your Windows documentation.)
Sending Data to Another Process

Horizon lets you send data from one process to another to make your library and record management tasks easier. (For example, if you have access to both the MARC Editor and the Serials processes from your workstation, you can send a serial bib record from the MARC Editor to either Serials Checkin or Serials Control.)

To send data, you locate the data that you want to send, then access the Send To menu. The Send To menu lists the available places to which you can send the data. Here is an example of the Send To menu from a Titles search screen:

![Send To menu example](image)

Each “receiver” (Horizon process that accepts the data) must be able to receive the type of data you want to send. Therefore, the only options Horizon lists in the Send To menu are valid options. (For example, you can send only item records to Checkout. You must also have a borrower identified in Checkout. This is because the Checkout process lets you check out only items to a specific borrower; you cannot check out bib records or purchase requests to an empty CKO window.)

Generally, you can send data from any list that contains bib, authority, or item data.
Here is a partial list of windows or processes from which you can send data:

<table>
<thead>
<tr>
<th>Main Process</th>
<th>Sending Window or Process (Producer)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cataloging</td>
<td>MARC Editor</td>
</tr>
<tr>
<td></td>
<td>Item List</td>
</tr>
<tr>
<td>Searching</td>
<td>Bib Display</td>
</tr>
<tr>
<td></td>
<td>Bib List</td>
</tr>
<tr>
<td></td>
<td>Call List</td>
</tr>
<tr>
<td></td>
<td>Item Course Title</td>
</tr>
<tr>
<td></td>
<td>Close Auth</td>
</tr>
<tr>
<td></td>
<td>Item List</td>
</tr>
<tr>
<td></td>
<td>Open Auth</td>
</tr>
<tr>
<td></td>
<td>Open Uniform Title</td>
</tr>
<tr>
<td></td>
<td>Title List</td>
</tr>
<tr>
<td></td>
<td>Z Bib List</td>
</tr>
<tr>
<td></td>
<td>Z Bib Display</td>
</tr>
<tr>
<td></td>
<td>Z Scan List</td>
</tr>
<tr>
<td>Serials</td>
<td>View PO</td>
</tr>
<tr>
<td></td>
<td>PO History</td>
</tr>
<tr>
<td></td>
<td>Binding Claim</td>
</tr>
<tr>
<td></td>
<td>Binding</td>
</tr>
<tr>
<td></td>
<td>Checkin</td>
</tr>
<tr>
<td></td>
<td>Claims</td>
</tr>
<tr>
<td></td>
<td>Issue</td>
</tr>
<tr>
<td></td>
<td>Route Set List</td>
</tr>
</tbody>
</table>
The Send To function works in one of these ways, depending on what kind of data you want to send and where you want to send it:

- When you are working in a process from which you want to send data and you choose a destination from the Send To menu, Horizon automatically starts the receiver. (For example, you can do a search for an item using the New Search process and choose MARC Editor from the Send To menu. Horizon automatically opens the MARC Editor, if it is not already open, and displays the item’s bib record.)

These receivers start automatically when you choose them from the Send To menu:

<table>
<thead>
<tr>
<th>Receivers that start automatically</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Request (You can send multiple items to this receiver.)</td>
</tr>
<tr>
<td>MARC Editor</td>
</tr>
<tr>
<td>Copy/Item List (This option opens the appropriate copy or item record.)</td>
</tr>
<tr>
<td>Global Change (You must choose multiple items to send before Horizon displays this option.)</td>
</tr>
<tr>
<td>Checkin</td>
</tr>
<tr>
<td>Recall Item</td>
</tr>
<tr>
<td>Serials Checkin (You can send multiple items to this receiver.)</td>
</tr>
<tr>
<td>Serials Control</td>
</tr>
</tbody>
</table>

- If you do not see the receiver to which you want to send data when you choose Send To from a sending process, you must start the receiver first. (For example, if you want to send a bib record from the MARC Editor to a purchase order, you must open one or more purchase orders. Then return to the MARC Editor and choose the purchase order you want from the Send To menu.) In some cases, you must also have a specific part of the receiver identified before you can send the data.

You must start these receivers before you can choose them from the Send To menu:

<table>
<thead>
<tr>
<th>Receivers that you must start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific Purchase Order (You can send multiple items to this receiver.)</td>
</tr>
<tr>
<td>Specific Purchase Request (You can send multiple items to this receiver.)</td>
</tr>
<tr>
<td>Non-MARC Editor (You must identify a specific editable authority tag field.)</td>
</tr>
<tr>
<td>Check out (You must identify a specific borrower.)</td>
</tr>
<tr>
<td>Fast Add</td>
</tr>
<tr>
<td>Reserve Bookroom Title (You must identify a course and instructor.)</td>
</tr>
<tr>
<td>Place Title</td>
</tr>
<tr>
<td>Withdraw Title</td>
</tr>
</tbody>
</table>
To use the “Send To” function

1. Display the data you want to send to another part of Horizon.
   (For example, display a Copies search results screen.)
2. Do one of these options to open the Send To menu:
   - Choose Edit, Send To.
   - Click the Send To icon ( ).
   - Press F10.
   - Right-click on the window and choose Send To.
3. If the Horizon process to which you want to send data does not display in the list, start the process to which you want to send the data (including the specific part of the process, such as an identified borrower, if necessary) and repeat this task.

   **NOTE**
   If you start the process to which you want to send data and the process still does not display in the Send To menu, you cannot use the Send To function to send that data to that process.

4. Highlight the process to which you want to send the displayed data.
5. Click OK.
   Horizon starts the process you chose, if necessary, and sends the data to the process.

Changing Information for a Group of Items

On occasion, you may need to change the information in a specific field for multiple item records. (For example, before moving a group of items to a new location, your library needs to change the Location field on every item record so borrowers can find the items.) You can change the information in one or more fields for multiple item records by using Item Group Editor.

   **NOTE**
   If you need to change only the status for a group of items, you can use the Item Group Editor–Status Only process. (For example, you may want to remove items from circulation that need repair.) By creating an item group for the items, you can do a batch edit that will change the status to “Damaged” for all of those items at once instead of having to edit each individual item record. (For more information, see “Changing Item Statuses” in the “Borrower and Item Records” chapter of the Circulation Guide.)

You can use Item Group Editor to edit information in these fields for a group of items:
- Item Type
- Location
- Collection
- Call Type
- Call No.
Item Group Editor lets you archive, edit, and restore data that relates to a group of items. To use Item Group Editor, you first create a group of items (called an item group, or group) by searching for items that match your specific criteria. You can archive information about those items to keep a copy of the information you originally cataloged. Then you can change the data in certain fields for the whole group at once. These changes can be temporary or permanent. If they are temporary, when the time to use those temporary changes has passed, you restore the archived, original information.

You can use Item Group Editor when you do tasks like these:

- Loaning a group of items to another agency.
- Transferring materials permanently to a new location.
- Making a group of items available for reserve only.
- Making a group of items available for media scheduling.
- Changing fine rates for a group of items.
- Changing the loan period for a group of popular items such as holiday books during peak times.
- Choosing items for users who borrow items through home service.
- Changing groups of call numbers.
- Adding local notes to items.
- Correcting default information.
- Changing or identifying a purchasing source.
- Changing the status of a section of items so borrowers cannot check them out during inventory.
- Renewing an order for a group of journals.
- Changing the price on a group of journal renewals.

(For instructions on using Item Group Editor to archive, edit, and restore data for groups of items, see the “Using Item Group Editor” chapter of the Circulation Guide or the “Item and Copy Records” chapter of the Cataloging Guide.)
Chapter 3: Basic Tasks

Entering Special Characters and Diacritics

When you complete records in Horizon, you may want to enter special characters and diacritics that are not available on your keyboard. (For example, you may want to enter the copyright symbol [©].) Diacritics are marks used on or near alphabetical characters to indicate pronunciation or inflection, such as an accent mark (‘) or tilde (~).

You can enter the special characters and diacritics in three main ways: You can use the lead-in and the keystrokes to enter a diacritic, you can double-click a diacritic row in the Diacritic Shortcut bar, or you can click a button on the Diacritic Button bar. (For information on setting up diacritics, see the “Customizing Diacritics” chapter in the Launcher Configuration Guide, or talk to your system administrator.)

If you know the ALA hexadecimal (hex) set code for a diacritic, you can also enter diacritics using a hex code.

This section explains these topics:

- Using Diacritic Shortcuts from the Keyboard
- Using the Diacritic Shortcut Bar
- Using the Diacritic Button Bar
- Using ALA Hex Set Codes to Enter Diacritics
Using Diacritic Shortcuts from the Keyboard

The fastest way to enter diacritics is by pressing a few keys on your keyboard. You can enter a diacritic by pressing the F7 function key and the specific shortcut key for the diacritic.

Before You Begin

Before you can effectively use diacritic shortcuts, you need to find out what shortcut to use for each diacritic. You can view the shortcuts in the Shortcut column of the Diacritic Shortcut bar.

To display the Diacritic Shortcut bar, choose Diacritic Shortcut Bar from the View menu:

The Shortcut column displays the shortcut key for each diacritic. You or your system administrator can change these shortcut keys.

You can use the Print Screen key on your keyboard to print a list of these shortcuts. (For more information, see Windows help.)

To use diacritic shortcuts from the keyboard

1. Log in to Horizon.
2. Start a process where you need to enter information that includes diacritics.
   (For example, you might need to create a bibliographic record for a new book in a foreign language.)
3. Put your cursor in a field where you can enter information.
4. Start completing or updating the field.
5. When you need to enter a diacritic, press F7 and then the keystroke combination for the diacritic.
   (For example, you may press F7, then press CTRL+3 to enter the British pound.)
   Horizon puts the diacritic at the insertion point.
6. Enter any other information that you need in the record.
7. Save your changes.
Chapter 3: Basic Tasks

Using the Diacritic Shortcut Bar

You can enter diacritics using the Diacritic Shortcut bar. The shortcut bar has columns for the keystrokes, examples of the diacritics, and descriptions of the diacritics.

To use the Diacritic Shortcut bar

1. Log in to Horizon.
2. Choose View, Diacritic Shortcut Bar.
   Horizon opens the Diacritic Shortcut bar:

   ![Diacritic Shortcut bar]

   Diacritic Shortcut bar. If you want to move it to a new location, you can click on the top of the bar, then drag the bar to anywhere in the Launcher workspace.

   NOTE
   Your screen might not look exactly like the example. If you put the Diacritic Shortcut bar elsewhere on the Launcher workspace during your previous login, Horizon will open the bar in that place.

3. Start a process where you need to enter information that includes diacritics.
4. Start completing or updating a field.
5. When you need to enter a diacritic, do one of these options:
   - Find the diacritic that you need on the Diacritic Shortcut Bar, and press the keystrokes to invoke it.
     (For example, to create the Greek beta (ß), and if you are still using the default settings, use the keystrokes F7, b.)
   - Double-click the diacritic that you need on the Diacritic Shortcut Bar.
Using the Diacritic Button Bar

You can enter diacritics using the Diacritic Button bar:

1. Log in to Horizon.
2. Choose View, Diacritic Button Bar.

   Horizon displays the Diacritic Button bar on or near the workspace, depending on how your system is set up. If you want to move it to a new location, you can click on the top of the bar, then drag the bar to anywhere in the Launcher workspace.

3. Open a record that you want to create or edit.
4. Start completing or updating a field.
5. When you need to enter a diacritic, find the diacritic on the button bar.
6. Do one of these options:
   - If the diacritic is its own character, click the button for the diacritic.
   - If the diacritic should appear above or below a character, type the letter that you want to combine with the diacritic, and then click the button for the diacritic.

   Horizon combines the diacritic with the letter or puts it at your insertion point.
Here is an example that shows how to enter a Spanish name as part of the name of a book in a bibliographic record:

Horizon inserts an accent above the “e” in this record. The mouse pointer hovers over the acute button that was used to put the accent over the “e” in José.

7 Repeat steps 5 and 6, as necessary, until you have completed the record.
8 Save the file.

Using ALA Hex Set Codes to Enter Diacritics

You might want to enter diacritics by entering the ALA hexadecimal (hex) set code. A hex set code is a four-digit code.

This section describes how to view the codes and how to use them.

**NOTE**

You can view ALA hex set codes only if you have access to the Customize Launcher window.

To view an ALA hex set code

1 Log in to Horizon.
2 Choose Tools, Customize Launcher.
Horizon displays the Customize Launcher window.

3  Click the **Diacritics** tab.
4  Click **New**.
5  Choose a list group that has the diacritic that you want.
6  Mark the **Show Unicode Value** box.
7  Find the diacritic that you want.
8  Make note of the four-characters that follow the “x” in the hexadecimal code for that diacritic.
   
   (For example, the character string that you need from the diacritic for the digraph “ae” is 00e6.)

**To use ALA hex set codes to enter diacritics**

1  Log in to Horizon.
2  Open a record in which you need to enter a diacritic.
3  Start completing or updating a field.
4  When you need to enter a diacritic, enter a less than symbol ( < ), a capital “U”, a plus sign, and then the four-character code, followed by a greater than symbol ( > ).

   For example, for the lowercase digraph “ae,” enter “<U+00e6>”:

   ![Image showing how to enter diacritics](image)

   **NOTE**

   The hexadecimal code remains in the field until you save the record. Once you save the record, Horizon displays the diacritic instead of the code.

5  Repeat steps 3 and 4, as necessary, until you have completed the record.
6  Save the file.
Here is the same bibliographic record after the record is saved:

<table>
<thead>
<tr>
<th>Status: cc Created: 12/19/01 Updated: 1/7/01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner Default</td>
</tr>
<tr>
<td>Basic Leader (Optional)</td>
</tr>
</tbody>
</table>
| 000  
  n  n  a  n  7  |
| 008  Date  YYYY Dates:  YYYY Dates:  YYYY City  xx |
| 245  0  a  The Encyclopedia Britannica     |

The digraph after the record is saved
This chapter explains how to search for items in your library catalog. It explains how to do basic and expert searches, and how to use Horizon’s searching features and search different databases.

- About Searching 4-3
- Searching Paths 4-7
- Basic Searching 4-12
- Searching Features 4-20
- Other Types of Searching 4-39
About Searching

Horizon lets you search for records in your library catalog and Horizon database. When you do a search, Horizon reviews indexes stored on your Horizon database, looking for records that match your search terms, and then displays the results of your search. You can then customize your search results by sorting or limiting the records found to meet certain criteria. (For example, you can limit your search results to titles published after 1985.)

In addition to basic searching, you can do expert searching (such as searching for multiple terms). You can focus your search on new records that have recently been added to your library’s catalog, or search another library’s database.

You can also use staff search windows to do non-searching tasks. (For example, you can save a list of bibliographies, make a request for an item that has been checked out, or view detailed information about an item.)

NOTE

This chapter explains only how to use staff search windows. Borrowers can search your library’s Horizon catalog by using a web browser to access the Horizon Information Portal searching interface. (For more information on Information Portal, see the Information Portal online help or the Information Portal System Administrator's Guide.)

This “About Searching” section explains these topics:
- Setup for Searching
- Records You Can Search For
- Types of Searches
- Entering a Search Term
- Searching Processes

This chapter explains these topics:
- Searching Paths
- Basic Searching
- Searching Features
- Other Types of Searching
Setup for Searching

Your system administrator can set up how searching works on your Horizon system. For example, your administrator can determine these types of things:

- The indexes that you can choose to search from a certain search window (such as an index of borrowers or a keyword index of titles).
- What options are available to help you limit your search by certain criteria, such as publication date or call number.
- The type of information that displays as a result of your search, whether the results are limited by certain criteria (such as location or collection), and whether you can view additional details about a particular item.
- Whether you can search using a stand-alone Staff PAC program or search a Z39.50 database. (For more information, see “Searching Different Databases” on page 4-46.)

If you have questions about the searching features that are available to you, talk with your system administrator.

Records You Can Search For

When you search your library’s catalog, you can search for these main types of records:

- **Bibliographic (bib) records.** Each title in your library catalog has a unique bib record that contains title, author, and publishing information. Libraries can purchase standardized (MARC) records or they can create their own. (For more information, see the “Bibliographic Records” chapter of the Cataloging Guide.)

- **Authority records.** An authority is a standard form of a search term. (For example, your library uses a standard form of an author’s name, a subject heading, or a series title.) Authority records are important for maintaining accuracy and consistency in the library catalog. (For more information, see the “Authority Records” chapter of the Cataloging Guide.)

You can also search your library’s database for other types of records, depending on the Horizon products that your library uses, and whether your system administrator allows you to have access to the records. For example, you may be able to search your library database for these types of records:

- **Borrower records.** Each borrower who checks out items from your library has a unique borrower record. This record lets you keep track of your borrowers’ contact information, the items they have checked out, fines due, and so forth. (For more information, see the “Borrower and Item Records” chapter of the Circulation Guide.)

- **Purchase orders.** A purchase order lets you keep track of items your library has ordered or received from a vendor. (For more information, see the “Purchase Orders” chapter of the Acquisitions Guide.)
• **Course and instructor records.** If your library maintains a reserve book room, these records let you keep track of instructors and the courses they teach so you can more easily keep items for the instructors on reserve. (For more information, see “Reserve Bookroom Basics” in the *Reserve Bookroom Guide*.)

**NOTE** This chapter focuses on searching your library’s catalog for bib or authority records. However, the basic searching tasks explained in this chapter can also apply to other types of searching you do in Horizon.

### Types of Searches

You can do several types of searches, depending on the information you have when you start. There are three types of searches in Horizon:

- **Keyword search.** Lets you search for items by entering keywords from the item’s title, contents, subject, author, or series fields. Horizon finds a match by comparing your search terms with a list of words that are compiled from the record tags in the database or from a table. (For example, a title keyword search of your library’s catalog might compare search terms to data stored in all MARC title tags.)

- **Alphabetical search.** Lets you browse an alphabetical list of records by title, author, subject, or series. An arrow cursor points to the search result that most closely matches your search term.

- **Exact match search.** Lets you search for items by entering letters or numbers for which there is one unique match in the database (such as a call number, barcode, or ISBN number). When you do an exact match search by item barcode, the Copies window displays the specific item you searched for at the top of the list.

The types of searches you can do depend on the search indexes set up by your system administrator. (For example, your system may include ISBN, ISSN, volume, call number, and cross-index searches.) A search index may also be referred to as a “search option,” which can combine several search indexes. (For example, a general keyword search may combine title, subject, author, and serial keyword indexes.) (For more information on search indexes, see “Search Options” in the “Searching Setup” chapter of the *System Administration Guide.*)
Chapter 4: Searching

Entering a Search Term

After you choose a search option, you can enter a search term. A search term is the text you want to find. If you choose a keyword search, Horizon searches for the terms exactly as you enter them. If you choose an alphabetical search, Horizon searches for the entry with the closest spelling to your term. When you enter a search term (for example, a subject keyword), follow these guidelines:

- **Capitalization.** You can enter search requests in either uppercase or lowercase letters. The search functions are not case sensitive.

- **Hyphenation.** Horizon searches for hyphenated words as two separate words. Therefore, you can enter hyphenated terms (such as “cease-fire” or “trade-in”) with or without a hyphen. However, if you do not include the hyphen, be sure to enter the term as two words (for example, “trade in”, not “tradein”).

- **Punctuation.** Punctuation (apostrophes, commas, periods, accent marks, multiple spaces, and so forth) does not affect the search. However, you can use certain punctuation marks, such as parentheses, to limit or expand searches.

- **Significant Digits.** In staff searching, you can search for items by barcode. This lets you enter a barcode that represents a unique match in the database. If you want to, you can enter just the significant digits of an item barcode (the digits after the leading zeros). Horizon adds the prefix and the leading zeros to construct the entire barcode and identify it as unique.

Searching Processes

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

- **New Search**
- **200.60 Search**
- **New Additions**
  - View New Titles
  - View New Authors
  - View New Subjects
  - View New Statuses
- **Request**
  - View Borrower Request List
  - View Borrower Request List
- **PAC Control Menu**
  - PAC Flavor Table
  - Search Option Table
  - PAC Library Views
  - MARC Map Table

Use these processes to search for items in your library’s catalog or remote library catalogs.

Use these processes to search for records that have recently been added to your library’s catalog.

Use these processes to view borrower’s requests for library items.

Your system administrator uses these processes to set up staff searching.
You may see only some of these Searching processes on your navigation bar. Your security setup and Launcher configuration determine what processes are available on your navigation bar, and where they display. (For more information, see your system administrator or the Launcher Configuration Guide.)

NOTE

You can also do searches using other processes within other folders on the navigation bar. (For example, you can search for a purchase request in Acquisitions by choosing the Find PR process.) For information on these processes, see the Horizon user’s or administrator’s guide that explains the type of record you want to search for.

Searching Paths

After you enter a search term, you can move through a series of windows to find the items you want. This series varies, depending on the search you choose. This section explains how search windows relate to each other and what each window looks like.

This diagram outlines the most common search paths:
### Chapter 4: Searching

This table explains how to move through the windows in a search path:

<table>
<thead>
<tr>
<th>To do this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move to the next window</td>
<td>Choose the left-most button in the window or press <strong>ENTER</strong>.</td>
</tr>
<tr>
<td></td>
<td>(For example, to move from the Titles List window to the Bibliographic Detail window, choose <strong>Show Detail</strong>.)</td>
</tr>
<tr>
<td>Go back to the previous window</td>
<td>Press <strong>ESC</strong>, click <strong>Cancel</strong>, or click on the previous window’s title bar.</td>
</tr>
<tr>
<td>Choose one or more entries to view in more detail</td>
<td>Click once on each entry, then press <strong>ENTER</strong>.</td>
</tr>
<tr>
<td>Start a new search</td>
<td>Press <strong>F2</strong>.</td>
</tr>
</tbody>
</table>

This section describes these types of windows in the search path:

- Main Search Window
- Title Alphabetical Browse List Window
- Authority Alphabetical Browse List Window
- Authority List Window
- Titles List Window
- Bibliographic Detail Window
- Copies Window
Main Search Window

You can access the main search window in one of three ways:

- Press F2.
- Double-click the New Search process on the navigation bar.
- Choose Search PAC from the File menu.

From the main search window, you can begin a search. This window displays a list of the search indexes determined by your library. You also enter your search term in this window.

(For more information on the features on this window, see “Search Windows” on page 2-16.)

Title Alphabetical Browse List Window

Horizon displays this window when you conduct a title alphabetical browse search. From this window, you can display the Bibliographic Detail window for an item.
Chapter 4: Searching

Authority Alphabetic Browse List Window

Horizon displays this window when you conduct an authority alphabetical browse search. From this window, you can view the Titles List window and Bibliographic Detail window for an authority.

Authority List Window

Horizon displays this window when you conduct an authority keyword search (for example, Author, Series, and Subject keyword). From the Authority List window, you can view the Titles List window and Bibliographic Detail window for one or more authorities.
**Titles List Window**

Horizon displays the Titles List window when you conduct a title keyword search, or when you choose entries from a browse or keyword list, (for example, Author Alphabetical or Author Keyword). From this window, you can view the Bibliographic Detail window.

**Bibliographic Detail Window**

Horizon displays the Bibliographic Detail window when you choose a specific title from a previous list, or when a search yields only one match. This window includes information such as title, author, and subject (also called a bib record). The call number displayed on this window comes from the item record, except when the Bibliographic Detail window is for a serial title. In this case, the call number comes from the serial’s copy record, even if there are also item records for the serial title. From this window, you can view the Copies window.
Copies Window

The Copies 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. (For instructions, see “Making a Request” on page 4-28.) When you do an exact match search by item barcode, the Copies window displays the specific item you searched for at the top of the list.

Basic Searching

The types of searches you can do depend on the search options set up by your system administrator.

This section explains these topics:

- Doing a Basic Search
- Keyword Searching
- Alphabetical Searching

Doing a Basic Search

Generally, you follow the same steps to conduct any kind of search. To start a new search, you must first access the Main Search window, where you enter your search criteria. This section explains how to access the Main search window, and how to move through various windows until you can view detailed information about the item you find.

To do a basic search

1. Do one of these options:
   - Press F2.
   - Double-click the New Search process.
     The default location of this process is the Searching folder on the navigation bar.
   - Choose File, Search PAC.
Horizon displays the Main Search window:

2 Choose a search option from the Indexes list.
(For more information, see “Keyword Searching” on page 4-13 or “Alphabetical Searching” on page 4-18.)

3 Enter your search term in the Search for field.

4 Click OK or press ENTER.
Horizon displays a list of titles or headings.

5 Do one of these options:
- If Horizon displays a list of titles, continue with step 6.
- If Horizon displays a list of headings, do these steps:

   1 Choose a title.
   2 Click Show Detail.
   Horizon displays a bib record for the title.

8 Click Show Copies to view the copy status and call number.
Horizon displays the copies your library has.

9 Highlight a copy.
10 Click Detail Status to view more information about the highlighted copy.
Horizon displays the Item Detail Status window. (For more information, see “Viewing Detailed Information about an Item” on page 4-34.)

---

**Keyword Searching**

You can do a keyword search to find items when you do not have exact bibliographic information, such as the author or title. Keyword searching lets you search for records that have a specific word or words in the title, contents, subject, or series. You can search for one keyword or many, or for a whole keyword or part of a keyword. You can also view a keyword list that shows the possible keyword matches for a specific search index.
For example, if you want to find items with titles that contain the words “medical procedures,” choose the Title Keyword search option and enter “medical procedures” in the Search for field. Or if you want to find items about medical procedures with any title, choose the Subject Keyword search option and enter “medical procedures” in the Search for field.

If your system is set up to display international characters (using Unicode), you can do a keyword search on foreign language indexes.

The types of keyword searches you can do depend on the search options set up by your system administrator.

**IMPORTANT**

Horizon does not locate misspellings or variations of a keyword. If no matches are found, check the spelling of the word or enter a truncated version of the word. Your Horizon system may be set up to ignore common words, such as “man” or “the.”

This section explains these topics:

- Doing a Keyword Search
- Viewing a Keyword List
- Using Keyword Browse in Unicode

**Doing a Keyword Search**

You should decide which type of keyword search you want to do before you begin searching. The simplest type of keyword search is to enter a single keyword in the Search for field.
You can also enter multiple terms in the Search for field. This search lets you locate records (such as titles, authors, or subjects) using two or more keywords, as well as Boolean operators (for example, “tropical OR rain forest”). Multiple terms can either narrow or broaden a search.

**NOTE**

To use the Boolean operators AND, OR, NOT, you must type them in all capital letters, otherwise the system assumes it is a word to search for. You can also use a minus character (-) immediately before a word instead of NOT. For example, Bears -Chicago is the same as Bears NOT Chicago.

The AND operator is always implied between words unless you enclose the words in quotation marks to indicate that you want to perform a phrase search.

This table lists the different methods of entering a multiple-term search:

<table>
<thead>
<tr>
<th>To do this</th>
<th>Enter this</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Narrow a search</td>
<td>A space or “AND” between each keyword</td>
<td>If you enter “Symphony Orchestra,” Horizon locates records that contain both words.</td>
</tr>
<tr>
<td>Broaden a search</td>
<td>“OR” between each keyword</td>
<td>If you enter “Symphony OR Orchestra,” Horizon locates titles with either term.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Using “OR” is helpful to search for terms with variant spellings, such as “Navajo” or “Navaho,” or when you are searching for the plural and singular forms of a word, such as “atlas,” “atlases,” “map,” or “maps.”</td>
</tr>
<tr>
<td>Narrow and broaden a</td>
<td>A combination of the above formats, and</td>
<td>If you enter “Art (London OR Paris OR Rome),” Horizon locates titles with the word “Art” plus either “London,” “Paris,” or “Rome.”</td>
</tr>
<tr>
<td>search</td>
<td>parentheses</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE**

Combined keyword searches may slow the performance of the workstation. SirsiDynix recommends using between four and six indexes to do this type of search. If you need to use more than six indexes in a general keyword search, contact your system administrator.

If you are not sure how to spell a keyword or if you want to find different variations of a keyword, you can enter a truncated, or shortened, form of a keyword. A truncated keyword search lets you broaden your search by replacing one or more characters in a search term with a truncation symbol.
Here are the truncation symbols you can use:

- * (Asterisk). Replaces one or more letters. (For example, the term “manag*” could locate records that contain variations of the root “manag,” such as “management,” “manager,” and “managing.”) You can also use an asterisk in the middle of a word to substitute for one or more letters.

- ? (Question mark). Replaces one letter. (For example, you can enter “computer?” to locate 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.”)

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*,” or “sta*,” because they may produce lengthy lists of matches.

**To do a keyword search**

1. Press F2 to access the Main Search window.
2. Choose the keyword search option you want.
   (For example, choose “Subject Keyword” to search for records on a certain subject. For an explanation of search options, see “About Searching” on page 4-3.)
3. Enter a single-term, multiple-term, or truncated keyword in the Search for field.
   (For example, enter “corporate pol*”)
   If you are not sure what keywords you can use, click View Keywords to see a list of possible matches. (For more information, see “Viewing a Keyword List” on page 4-16.)
4. Click OK or press ENTER.
   Horizon displays a list of keyword headings that match your search.
5. Choose the keyword heading that most closely matches your search terms.
6. Click Show Titles.
   Horizon displays a list of titles that contain the selected heading. If only one title contains that heading, Horizon displays the Bibliographic Detail window.
7. Move through the search windows to find the information you need.
   (For instructions, see “Searching Paths” on page 4-7.)

**Viewing a Keyword List**

Horizon maintains a list of keywords used in the keyword index. An effective way to conduct a keyword search is to display the list of keywords and choose one to use as the search term.

**NOTE**

This feature is not available for the General Keyword search option.

**To view a keyword list**

1. Press F2 to access the Main Search window.
2. Choose any keyword search option, except “General Keyword.”
3. Click View Keywords.
Horizon prompts you to enter a word (or partial word) to begin the list:

4. Enter a whole or partial word in the field.
5. Click OK.

Horizon displays an alphabetical list of keywords:

6. Choose the keyword you want.
7. Click OK.

Horizon enters the keyword in the Search for field.
Chapter 4: Searching

Using Keyword Browse in Unicode

Unicode lets Horizon display international characters. When you do a keyword browse search to find a bib record, Horizon properly sorts and sequences the international characters in the list based on the index you choose. (For example, if you choose the Cyrillic index, Horizon sorts the entries according to Russian sorting rules.)

If the characters are Romanized, western European sorting rules apply. If the characters remain in their native language, you choose the index for that language. The sorting rules for that language apply to the sorting and sequencing throughout Horizon. (To purchase additional language indexes, contact your Horizon add-on sales representative.)

To use keyword browse in Unicode, do a standard search, but choose the index that has been set up for the language you want to use.

(For more information about Unicode, see “System Administrator Basics” in the “Getting Started” chapter of the System Administration Guide.)

Alphabetical Searching

Alphabetical searches show a list of all the records at your library in alphabetical order. If your main library branch shares items with other branches, an alphabetical search shows a list of items from all branches.

An alphabetical search is useful for finding a title or authority record that begins with a certain word. It can also help you find records that are difficult to locate using a keyword search because of the large number of matches a keyword search can generate.

You can enter all or the first part of a search term. (For example, enter “mar” or “marriage”.) During an alphabetical search, the system ignores initial articles such as “a,” “an,” and “the.” If you are searching for a heading that begins with an article, it is not necessary to enter the article. (For example, if you are searching for the series A Touchstone Book, enter “Touchstone Book”.)

When you do an alphabetical search, Horizon displays a browse list of records that match your search. The selector arrow points to the title that most closely matches the spelling of your search term.

If you have restricted your search, Horizon displays items that do not fit the restriction in gray. (For information, see “Restricting a Search” on page 4-20.)

The types of alphabetical searches you can do depend on the search indexes that your system administrator sets up.

These are the two main types of alphabetical searches you can do:

- Title. Lets you browse an alphabetical list of titles (bib records) in your library.
• **Authority.** Lets you browse an alphabetical list of authority records in your library. Some common authority records include author, subject, and series.

### To do an alphabetical search

1. Press **F2** to access the Main Search window.
2. Choose an alphabetical search option.
3. Enter all or the first part of your search term in the **Search for** field.
4. Click **OK**.
   
   Horizon displays a browse list of alphabetical headings. The selector arrow points to the item that most closely matches your search term.
5. Do one of these options:
   - If you can see the heading you want, choose the heading.
   - If you cannot see the heading you want, scroll until you find the heading you want, then choose it.
   - If the heading you want is elsewhere in the list and you do not want to scroll to that point, do these steps:
      1. Delete the heading in the **Your Search** field.
      2. Enter a new heading.
      3. Press **ENTER**.
      4. Choose the heading you want.
6. Click **Show Titles**.
   
   Horizon displays a list of titles that contain the selected heading. If only one title contains that heading, Horizon displays the Bibliographic Detail window.

   **IMPORTANT**

   Restrictions may block some of the titles for a heading from being displayed. A message alerts you of this. Choose **File**, **Restrict** to remove the restriction parameters and view all titles.

7. Move through the search windows to find the information you need.
   
   (For instructions, see “Searching Paths” on page 4-7.)
Chapter 4: Searching

Searching Features

Horizon includes several features that let you enhance your searching. You can customize your search results in many ways. (For example, you can restrict your search to include only audio recordings, or you can make a request for a book that is currently checked out.) You can also expand your search to include related works.

After you complete a search, you can do additional tasks, such as request an item that is checked out, view detailed information about an item, or save a list of items.

This chapter explains these topics:

- Restricting a Search
- Sorting a Titles List
- Limiting a Titles List
- Limiting a Search by Volume
- Viewing Related Works
- Conducting a Previous Search
- Requesting Items
- Viewing Detailed Information about an Item
- Saving a List of Bib or Item Records

Restricting a Search

Horizon lets you narrow the types and locations of records you want to search for. (For example, if you are interested in only nonfiction titles that are currently checked in, you can restrict your search to those two criteria.) Your system administrator sets up restrictions. (For more information, see “Search Restrictions” in the “Searching Setup” chapter of the System Administration Guide.)

You can restrict a search either before or during your search. You 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 click the Reset button.

The Titles List window displays only those items that match your restrictions. 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 for titles that do not match your restrictions.

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

- Collection
- Location
- Item status
- Item type

To restrict a search

1. Press F2 to access the Main Search window.
2  Click **Restrict**.

Horizon displays the Restrict Title Display window:

3  In the left column, highlight the restriction you want.

   You can choose only one. (For example, if you want to restrict your search results to books, highlight “Books Only.”)

4  In the right column, highlight all locations you want to search.

   (You can choose zero, one, or more locations.)

5  Click **OK** to apply your restriction parameters.

   Horizon displays the restriction criteria above the Search for field.

6  Begin your search.

   (For instructions, see “Doing a Basic Search” on page 4-12.)
Chapter 4: Searching

Sorting a Titles List

You can sort a list of titles to view them in a particular order. (For example, sorting by publication date lets you see which items are most current.) You can sort only numbered lists. You cannot sort lists for alphabetical searches. The sort order you choose remains in effect until you start a new search.

To sort a titles list

1. Access a list of titles.
   (For instructions, see “Doing a Basic Search” on page 4-12.)

2. Click Sort in the Titles window.
   Horizon displays the Choose Sort Columns window:

3. Highlight the first option that you want to sort by.
   (For example, if you want Horizon to display titles in order by year, click Pub Date.) Your choice moves to the top of the list in the dialog box.

4. Click additional options to sort by, in the order in which you want the titles to display.
   (For example, if you clicked Pub Date as the first sort option, you can click Title as the second sort option to display titles published in the same year alphabetically by title.) Your choice moves toward the top of the list in the dialog box.

5. If you want to, mark the Descending sort box to sort the list from last to first (for example, from Z to A or from the year 2000 to 1900).

6. Click OK.
   Horizon displays the list of titles sorted in the order you chose.

Limiting a Titles List

After you choose a search option and enter a search term, Horizon displays a list of records that match your search terms. You can further limit or narrow your search results to meet certain criteria. (For example, you can limit your search results to items published during or after 1984, or to items with titles that contain the word “labyrinth”.)

NOTE

This feature applies only to titles lists. You cannot limit alphabetical lists or other closed lists, such as subjects or authors.
You need to use these three elements to narrow your search results:

- **Field.** Specifies the field or criterion that you want to limit a search by. The field description is designated by a bibliographic record field name.
  (For example, if you limit a list to titles written by a certain author, “author” is the field that you want to limit the search by.)

- **Limiting Value.** Specifies the criterion 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 for that search.) You can truncate a limiting value if you choose “contains” as the limiting operator.

- **Limiting Operator.** Specifies the relationship between the field description and the limiting value.

Here are some examples of limiting operators:

<table>
<thead>
<tr>
<th>Operator</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>= Equal to</td>
<td>You may want to limit a list to items with a publication date of 1991 (publication date = 1991) or with an author named Williams (author = Williams). For more information on how Horizon handles the equal to operator in dates when records contain a range of dates, see “Limiting a Titles List Using Dates” on page 4-25.</td>
</tr>
<tr>
<td>&lt; Less than</td>
<td>You may want to search for items with a publication date before 1988 (publication date &lt; 1988) or with an author who comes before Babcock alphabetically (author &lt; Babcock).</td>
</tr>
<tr>
<td>&gt; Greater than</td>
<td>You may want to search for items with a publication date after 1996 (publication date &gt; 1996) or with an author who comes after Turner alphabetically (author &gt; Turner).</td>
</tr>
<tr>
<td>&lt;= Less than or equal to</td>
<td>You may want to limit a list to items with a publication date before or during 1961 (publication date &lt;= 1961) or with an author named Black or has the last name that comes before Black in the alphabet (author &lt;= Black).</td>
</tr>
<tr>
<td>&gt;= Greater than or equal to</td>
<td>You may want to limit a list to items with a publication date after or during 1984 (publication date &gt;= 1984) or with an author named Webb or has a last name that comes after Webb in the alphabet (author &gt;= Webb).</td>
</tr>
<tr>
<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) or whose author is not Franklin (author # Franklin).</td>
</tr>
</tbody>
</table>
To limit a titles list

1 Access a list of titles.
   (For instructions, see “Doing a Basic Search” on page 4-12.)

2 Click Limit in the Titles window.
   Horizon displays the Search Limit window:

3 Choose the field you want to limit the list by.

4 Click the limiting operator you want to use.
   (For an explanation of each limiting operator, see the table on page 4-23.)
5 Enter the text or value you want to limit the field against in the **Limit text** field.

6 Click **OK** or press **ENTER**.

Horizon 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 displays only those entries that match the criteria. You can choose any options from this window and resume your search.

**Limiting a Titles List Using Dates**

This section clarifies what Horizon does in staff searching when you use the Equal To operator to limit dates.

After you choose a search option and enter a search term, Horizon displays a list of records that match your search criteria. You can then choose to limit the list of titles using a limiting operator. (For example, you may want to limit the titles by publication date.) When you use the equal to ( = ) operator, Horizon finds a hit if the date value lies within a range of dates included in the date field in the MARC record. Horizon then arranges the years in sequence.

For example, if the date range in the MARC record is “[1997], c1959”, Horizon processes the information as “19591997”. As a result, a title with a publication date of “1988” falls within that date range. A publication date of “19--” also matches the search criteria because Horizon considers the dashes to be wildcards.

**Limiting a Search by Volume**

If you are searching for a journal title and want to locate a specific volume and issue, you can limit the search by specifying a volume or range of volumes. In addition to searching by volume, you can search for a volume by year.

**NOTE**

You can do volume and year searches on multi-volume items only.

**To limit a search by volume**

1 Choose the journal title you want to limit from a titles list.

   (For instructions, see “Doing a Basic Search” on page 4-12.)

2 Click **Show Detail**.
Horizon displays the Bibliographic Detail window:

3 Choose File, Volume Search. Horizon displays the Volume Search window:

4 Do one or both of these options:
   - Enter the volume number or numbers you want to limit the search to in the **Volume** field.
   - Enter the year you want to limit the search to in the **Year** field.

5 Click **OK**. Horizon displays the Copies window which lists the issues of the specified volume.

6 Click **Detail Status** to view more information about the item.

### Viewing Related Works

Horizon can show you items that are related to the item you find in your search. These items can be related by author, subject, series, or linked bib records. You can access related works from the Bibliographic Detail window.

**To view related works**

1 Display the bib record for a title.
   (For instructions, see “Doing a Basic Search” on page 4-12.)

2 Click **Related Works**.
Horizon displays the Related Works window:

3. Choose the related works category you want to view.
4. Click OK.

Horizon displays one of these windows:

- **Related Works.** Lists entries related to the original title by the category you chose. You can choose any options available from this window and continue your search.
- **Titles.** Displays a list of titles that are related to your original search title.
- **Bibliographic Detail.** Displays a bib record of a title that is related to your original search title.

**NOTE**

If you double-click on an underlined title in a bib record, Horizon displays the Bibliographic Detail window for that title.

---

**Conducting a Previous Search**

Horizon saves search strings and search indexes used since the last “time-out.” A time-out is the amount of time that elapses before the system clears all previous search strings and displays the Main Search window. Before that time-out occurs, you can return to the previous search strings, choose one, and do the search again.

**To conduct a previous search**

1. Access the Main Search window.
   (For instructions, see “Doing a Basic Search” on page 4-12.)
2. Click Prev. Search.

Horizon displays the Previous Searches window:

3. Choose a previous search string.
4. Click OK.
Chapter 4: Searching

Horizon highlights the previous search option in the Indexes list and enters the previous search term in the Search for field. If you want to, you can change this search term.

5 Click OK, and continue with your search.

---

Requesting Items

Horizon lets you request items that are checked out or unavailable. When more than one borrower has placed a request on a particular title, Horizon places the name of each borrower in a request queue (waiting list) in the order that the request was made. You can view the request queue and change the order of the names in the queue. When a borrower returns a requested item, the library notifies the first borrower on the list that the item is available.

Depending on your library’s policy, borrowers may be able to request a specific copy of an item. Borrowers may also be able to choose the method their library uses to notify them that their requested items are available—mail, e-mail, or phone.

If you need to change the pickup location or the request date, you can edit the request. If a request is no longer valid, you can delete the request from the queue. Borrowers can also delete requests that they no longer want.

This section explains topics:

- Making a Request
- Viewing a List of Requests
- Editing a Request
- Reordering Names in a Request Queue
- Deleting a Request

Making a Request

You can request items that are not currently available. (For example, if A Tale of Two Cities is currently checked out, you can make a request for the book when it becomes available.)

To make a request

1 Choose a title from a titles list, Bibliographic Detail window, or a Copies window.
   (For instructions, see “Doing a Basic Search” on page 4-12.)
2 Choose Request, Make Request, or press F5.

Horizon displays a borrower Search window:
3 Choose a search option from the **Indexes** list.

4 Enter your identifying information in the **Search for** field.
   (For example, enter your last name or your barcode.)

5 Click **OK** or press **ENTER**.
   Horizon displays the Hold Request window:

6 If available, do one of these options:
   - Mark **This Copy Only** to request this specific copy.
   - Unmark **This Copy Only** to request any copy.

7 If necessary, change the Pickup Location.
   To do this, click **Codes**, then choose a location from the list.

8 Enter any necessary comments in the **Comment** field.

9 If available, choose a notification method.

10 Save the file.
   Horizon closes the Hold Request window, then displays a message verifying that you have requested the title and that the library will be notified.
Viewing a List of Requests

You can view a current list of all the items a borrower has requested. You can also view a list of all the borrowers that have requested a specific title, if your system administrator sets up your search features to allow it. (For more information, see “Switches” in the “Setting Up Preferences for Users” section of the “Security and Preferences” chapter of the System Administration Guide.)

This section explains how to:

- View a borrower request list.
- View a title request list.

To view a borrower request list

1. Activate the View Borrower Request List process.
   The default location of this process is the Searching\Request folder on the navigation bar.
2. Search for and choose a title from a titles list, Bibliographic Detail window, or a Copies window.
   (For instructions, see “Doing a Basic Search” on page 4-12.)
   Horizon displays a borrower Search window:

3. Choose a search option from the Indexes list.
4. Enter the borrower’s identifying information in the Search for field.
   (For example, enter the borrower’s last name or barcode.)
5. Click OK or press ENTER.
6. If Horizon displays a list of borrowers, choose one, then click OK.
Horizon displays the Borrower Request List window:

To view a title request list

1. Choose a title from a titles list, Bibliographic Detail window, or a Copies window. (For instructions, see "Doing a Basic Search" on page 4-12.)

2. Choose Request, View Title Request List, or press CTRL+F5.

   Horizon displays the Item Request Queue:

   - Click here to view a list of borrowers waiting for the item you chose.
   - Click here to delete a request from the list.
   - Click here to edit the request.
   - Click here to delete a borrower from the request list.
   - Click here to view a list of titles that the borrower you chose has requested.
   - Click here to change the order of the queue.
Chapter 4: Searching

Editing a Request

If necessary, you can edit a request. (For example, you can change the pickup location or suspend the request until a later date.)

To edit a request

1. Do one of these options:
   • View a Borrower Request list.
   • View a Title Request list.
   (For instructions, see “Viewing a List of Requests” on page 4-30.)

2. Highlight the request you want to edit.

3. Click Edit.
   Horizon displays the Edit Request window:

   ![Edit Request Window](image)

4. Complete or update these fields, as necessary:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pickup Location</td>
<td>If you want to change the pickup location for this request, enter the code for pickup location, or click Codes to choose from a list.</td>
</tr>
<tr>
<td>Suspend Until</td>
<td>If the borrower wants to postpone this request until a later date, enter the date when the request should be activated.</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter a comment about this request, as necessary.</td>
</tr>
</tbody>
</table>

5. Save the file.
Reordering Names in a Request Queue

You can reorder the names in a request queue to give certain borrowers priority over others. (For example, you can move a faculty member to the top of the request list.)

NOTE
Horizon processes recalled items first, regardless of the queue order. (For more information about recalls, see the “Setting Up Recall Rules” section in the Circulation Setup Guide.)

To reorder the names in a request queue

1. Choose a title from a titles list, Bibliographic Detail window, or a Copies window. (For instructions, see “Doing a Basic Search” on page 4-12.)
2. Choose Request, View Title Request List.
   Horizon displays the Item Request Queue window:

   ![Item Request Queue Window]

   3. Choose the borrower you want to move.

   4. Click Reorder Queue.
      Horizon displays the Reorder Request Queue window:

   ![Reorder Request Queue Window]

   5. Enter the new position number of the borrower you want to move.
      (For example, enter “1”.)

   6. Click OK.
      Horizon displays the borrowers in their new positions in the Item Request Queue window.
Deleting a Request

If a borrower no longer needs an item or just does not want to wait for it, you can delete his or her name from the item request queue. Also, a borrower can delete a request from his or her list of requests.

To delete a request

1. Do one of these options:
   - View a Borrower Request list.
   - View a Title Request list.
   (For instructions, see “Viewing a List of Requests” on page 4-30.)
2. Choose the item or borrower you want to delete from the request list.
3. Click Delete.
   You are prompted to confirm the deletion.
4. Click OK.

Viewing Detailed Information about an Item

You can view detailed item information about each copy of a title in your library. If you have multiple copies of the same title, you can view information for each copy. (For example, you can see the item’s status, item type, location, order information, and the last person to borrow the item.)

If your library tracks in-house use of items, you can also view information about in-house use of an item. (For more information keeping track of in-house use, see “Checking In Items under Special Conditions” in the “Checkout and Checkin” chapter of the Circulation Guide.)

To view detailed information about an item

1. Access the Copies window of the title that you are searching for.
   (For instructions, see “Doing a Basic Search” on page 4-12.)

   Horizon displays the Copies window:
2 Highlight the copy with the item information you want to see.

3 Click **Detail Status**.

**NOTE**

If the Detail Status button does not display on this window, your searching options are not set up to allow you to view item information. You must be set up as an expert user. (For more information, talk to your system administrator.)

Horizon displays the Item Detail Status window:

Click Close to return to the copies window. Click Page Down to view more details.

You can change the size of this window to view more information.

---

**Saving a List of Bib or Item Records**

Saving a list of bib records or item records is called “bookmarking.” There is no limit to the number of records that you can save to a list. Once you have completed a list, you can print it or save it to a file.

You can save either bib records or item records, depending on the type of information you want to save.

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

This section explains these topics:

- Bookmarking a Record
Chapter 4: Searching

- Viewing a Bookmark List
- Printing a Bookmark List
- Saving a Bookmark List to a File
- Deleting a Bookmark Entry

**Bookmarking a Record**

You can bookmark records from one of these windows:

- Titles List or Title Alphabetical
- Bibliographic Detail
- Copies
- Call Number List

Horizon prompts you to specify whether you want to save the record as a title (bib record) or an item record. Horizon stores bookmarked titles on a Saved Items list or a Saved Bibs list.

**To bookmark a record**

1. Search for the title you want to save to a list.
   (For instructions, see “Doing a Basic Search” on page 4-12.)
2. Highlight the title you want.
3. Choose **Bookmarks, Add Bookmark Entry** or press **F6**.
   Horizon displays the Bookmark window:

   ![Bookmark Window]

   Mark “All locations” to save item records from all library locations.

4. Choose **Title** or **Item**, depending on the type of information you want to save.
5. If you want to save records from all locations, mark **All locations**.
6. Click **OK**.
   Horizon displays a message verifying that the record was saved.
7. Click **OK** to close the message.
8. Repeat steps 1 through 7 for each record you want to add to the list.

**Viewing a Bookmark List**

After you have created a list of bib or item records, you can view the list. (For example, you may want to view a list to find out the call number for a book you want to check out.) You can view this list from anywhere in Horizon.

**To view a bookmark list**

Do one of these options:

- To view a list of bib records, choose **Bookmarks, View Marked Titles**.
- To view a list of item records, choose **Bookmarks, View Marked Items**.
Horizon displays the list of records you saved:

Sort lets you change the order of your list. (For more information, see “Sorting a List Window” on page 2-21.)

Display lets you change how the information in the list displays. (For more information, see “Changing the Columns in a List Window” on page 2-18.)

This field shows the total number of records in your list.
Printing a Bookmark List

After you have made a list of bib or item records, you can print the list. You can print a list with full bib or item information, or you can print a list in a shortened form. You can view and print this list from anywhere in staff searching.

To print a bookmark list

1. Do one of these options:
   - To print a list of bib records, choose **Bookmarks, View Marked Titles**.
   - To print a list of item records, choose **Bookmarks, View Marked Items**.

   Horizon displays a list of saved records.

2. Print the list.

   Horizon displays a pop-up menu with print options.

3. Do one of these options:
   - To print a shortened record, choose **Print Brief Title Info**.
   - To print a complete record, choose **Print Full Title Info**.

4. Make sure your printer information is correct.

5. Click **OK**.

Saving a Bookmark List to a File

After you have made a list of bib or item records, you can save the list to a file. You can save the list with full bib or item information, or you can save the list in a shortened form. You can view and save this list from anywhere in staff searching.

To save a bookmark list to a file

1. Do one of these options:
   - To save a list of bib records, choose **Bookmarks, View Marked Titles**.
   - To save a list of item records, choose **Bookmarks, View Marked Items**.

   Horizon displays a list of saved records.

2. Choose **File, Save**.

   Horizon displays a pop-up menu with save options.

3. Do one of these options:
   - To save a shortened record, choose **Save Brief Title Info**.
   - To save a complete record, choose **Save Full Title Info**.

   Horizon displays the Save to File window. By default, Horizon displays the folder where you installed Horizon.

4. Choose the folder where you want to save your bookmark list.

5. Enter a file name for your bookmark list.

6. Save the list.

Deleting a Bookmark Entry

If you no longer want to include a bib or item record in your list of bibliographies, you can remove it from the list. You can view and delete entries from a list anywhere in staff searching.
To delete a bookmark entry

1  Do one of these options:
   • To delete a bib record, choose **Bookmarks, View Marked Titles**.
   • To delete an item record, choose **Bookmarks, View Marked Items**.
     Horizon displays a list of saved records.
2  Choose one or more entries to delete.
3  Choose **Bookmarks, Remove Bookmark Entry**.
   You are prompted to confirm the deletion.
4  Click **OK**.
   Horizon deletes the selected entries from the list.

**Other Types of Searching**

In addition to basic searching, Horizon lets you do other types of searching.

You can use compound searching or expert searching to search for multiple terms at once or to search on multiple indexes at once. You can focus your search on new records that have been added to your library’s catalog.

If you want to search a database other than the one that you logged in to, you can do so by doing a Z39.50 search or by searching using a stand-alone version of the Horizon Staff PAC product.

**NOTE**

For information on limiting a search or sorting search results, see “Searching Features” on page 4-20.

This section explains these topics:

- Doing a Compound Search
- Doing an Expert Search
- Searching for New Additions
- Searching Different Databases
Doing a Compound Search

For some tasks, Horizon displays a Compound Search window. This window lets you use the “AND” and “OR” boolean operators to broaden or narrow your search. (You can also use boolean operators to do an expert search. For more information, see “Doing an Expert Search” on page 4-42.)

To do a compound search

1. Activate the process that includes a compound search window. Horizon opens the Compound Search window:

2. Highlight the index you want to search.
3. Enter a search term in the Search for field.
4. Do one of these options:
   - Mark AND to narrow a search.
   - Mark OR to broaden a search.
5. Highlight a search index from the list of indexes.
6. Enter another search term in the Search for field.
7. If you want to add new results to the current ones, click Append List.
8. Repeat steps 4 through 7 until your search string is complete.

Horizon displays your search string as you enter it. You can enter up to 300 characters.

**NOTE**
For the search to work best, leave the last search term of the series in the Search for field.
9 Click **Search**.

If Horizon cannot find the information based on the search criteria, Horizon displays the Search Message window:

![Search Message Window](image)

10 If this window appears, click **OK** and repeat steps 2 through 9, as necessary, until you have a successful search.

Make sure you have spelled the codes correctly or you have selected the correct codes from the lists and that you have used the Boolean operators correctly.
Doing an Expert Search

Expert searching lets you use complex search strings in your search. A search string is a combination of search indexes and terms. Expert search strings are a powerful way to refine your search. You can do expert searches with keyword search indexes only, not alphabetical search indexes. You can enter variations of search terms (for example, multiple-term and truncated keywords). Your system administrator can set up the expert search option as part of a PAC flavor. (For instructions on setting up the expert search option, see the “Searching Setup” chapter of the System Administration Guide.)

To do an expert search

1. Press F2 to access the Main Search window.
2. Click Command Mode. Horizon displays the Expert Search window:

   Choose a search option here.

   Enter your search string here.

   Search command:
   `<title: >`

3. Double-click the keyword index you want to search. Horizon enters the keyword label in the Search command field:

   Search command:
   `<title: >`

4. Within the search index brackets, enter the word you want to search for:

   Search command:
   `<title: war >`

5. If you are using multiple words, click on an operator.
Horizon enters the operator within the search index brackets:

Search command:

\texttt{<title: war OR >}

6. Repeat steps 4 and 5 until you complete your search string within the selected index.

Search command:

\texttt{<title: war OR battle NOT peace>}

7. If you want to search on multiple indexes, move the cursor outside of the brackets.

\textbf{NOTE}

Combined keyword searches may slow the performance of the workstation. SirsiDynix recommends using between four and six indexes to do this type of search. If you need to use more than six indexes in a general keyword search, contact your system administrator.

8. Click on the operator you want to use to combine the multiple indexes.

Horizon enters the operator in the Search command field:

Search command:

\texttt{<title: war OR battle NOT peace> AND}

9. Repeat steps 3 through 8 for each additional index you want to search.

Search command:

\texttt{<title: war OR battle NOT peace> AND <subj: french AND revolution>}

10. Click \textbf{OK} or press \textbf{ENTER} to begin searching.

11. Move through the search windows to find the information you need.

(For instructions, see “Searching Paths” on page 4-7.)
Searching for New Additions

You can search for information that has recently been added to your library’s catalog. (For example, if you want to find out whether a new book that you have ordered has been cataloged and added to your library’s collection, you can search a list of new titles.)

You can search for these types of new information:

- Titles
- Authors
- Subjects
- Series

Your library’s system administrator and cataloging staff can determine how long information is considered new. For titles, the administrator can set a certain number of days after which the new titles are cleared from the list of new additions. (For more information, see “System-Wide Settings” in the “General Setup” chapter of the System Administration Guide.) For authors, subjects, and series, cataloging staff must manually clear new additions. (For more information, see “Clearing the New Authority Table” in the “Authority Records” chapter of the Cataloging Guide.)

To search for new additions

1. Depending on the new information you want to search for, activate one of these processes:
   - View New Titles
   - View New Authors
   - View New Subjects
   - View New Series

The default location for these processes is the New Additions folder on the navigation bar.
Horizon displays a list of titles, authors, subjects, or series, depending on the type of search you chose. Here is an example of a list of new subjects:

The title bar shows the date after which these subjects were added to Horizon.

2. Do one of these options:
   - Continue with your search.
     (For instructions, see “Doing a Basic Search” on page 4-12.)
   - Print the list.
   - Click Cancel to close the window.
Chapter 4: Searching

Searching Different Databases

As you log in to Horizon, you choose the server and database that you want to use while you work in Horizon. All of your searches during the current log in session access this same server and database.

Occasionally, while you are working in one database, you may want to search another database. (For example, you may want to search for MARC records at another library.) The easiest way to search another database is to start a Z39.50 search from within the Launcher. However, if the library you want to search does not have a Z39.50 server, you can search using a separate Horizon staff searching program.

This section explains these topics:
- Searching a Z39.50 Database
- Searching another Horizon Database Using a Stand-alone Staff Searching Program

Searching a Z39.50 Database

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

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

To search a Z39.50 database

1. Activate the Z39.50 Search process.
   The default location of this process is the Searching folder on the navigation bar.
   Horizon displays the Select a Z39.50 Server dialog box.
2. Highlight the server you want to search.
   You can choose only one server at a time.
3. Click Connect.
   Horizon displays a Z39.50 Search window:
4 Choose the Z39.50 index you want to search.
5 Enter a search term in the **Search for** field.
6 Search for an item.
7 When you finish searching, click **Disconnect**.

**Searching another Horizon Database Using a Stand-alone Staff Searching Program**

When you log in to Horizon, you choose the database that you want to work in. Occasionally, you may want to search another Horizon database while still working in your own Horizon database. (For example, you may want to find out whether another library has an item available. Or, if you are a cataloger, you may want to search for a MARC record at another library, and send it to your own database.)

If the Horizon database you want to search is not available for Z39.50 searching, you may be able to search using a stand-alone Horizon staff searching program. This program lets you do a basic search in Horizon. However, you cannot use all of Horizon’s search features. (For example, you cannot search for requests or new additions.)

**Before You Begin**
- Find out from your system administrator whether the separate staff searching program is available from your Launcher or your Horizon workstation, and how you can access it.
  
The program is not available from your Launcher by default, so your system administrator must add the program separately. (For more information, see “Adding a Process to the Navigation Bar” in the “Setting Up Preferences for Users” section of the “Security and Preferences” chapter of the *System Administration Guide*.) The administrator must also increase the amount of shared memory available on your system. (For more information, see “Error Messages” in the “Getting Help” section of the “Maintenance and Day End” chapter of the *System Administration Guide*.)
- Find out the user ID, password, server name, and database name for the Horizon library you want to search.

**To search another Horizon database using a stand-alone staff searching program**

1 If you want to search for a record that you can send to your primary Horizon database, log in to Horizon as you normally do.
2 Start the stand-alone staff searching program.
   
   Depending on how your system administrator set up your system, the program may be available as a process in your navigation bar, as a button on your toolbar, or as an icon on your workstation desktop.
   
   The search program displays the Horizon Sunrise startup dialog box.
3 Enter the user ID, password, server name, and database name for the Horizon library you want to search.
4 If you want to change the login options, click the **Options** button, and update the fields in the Login Options dialog box.
5 Click **OK**.
Chapter 4: Searching

The search program opens, and displays a Search window:

6 Continue with your search.
   (For instructions, see “Doing a Basic Search” on page 4-12.)

7 If you want to send a MARC record to your regular Horizon database, choose **Edit, Send to Launcher**.
   Horizon sends the MARC record to your Launcher workspace.

8 To close the searching program, choose **File, Exit**.
Symbols
* (asterisk)
in truncated searches 4-16
< (less-than symbol)
using with hex set codes 3-19
> (greater-than symbol)
using with hex set codes 3-19
? (question mark)
in truncated searches 4-16

A
Acquisitions
defined 1-15
Add checkpoint every rows field 2-48
Add delete field 2-47
Add go every rows field 2-48
Add use database field 2-47
Administration
defined 1-15
Adobe Acrobat Reader
downloading from the Web 1-4
ALA hex set code
digraph example 3-19
using to enter diacritics 3-18
viewing 3-18
Alphabetical search
defined 4-5
for authors 4-19
for subjects 4-19
for titles 4-18
ignoring initial articles 4-18
overview 4-18
Alphabetical Titles window 4-9
AND
narrowing searches 4-15, 4-40
in the Compound Search window 4-40
in the Expert Search window 4-42
Append List field 4-40
Approval Required window 1-16
Arrowhead and ellipsis button 2-33
Arrowhead button 2-33
Article, initial
ignored in alphabetical searches 4-18
As Displayed option 3-8
Asterisk (*)
in truncated searches 4-16
Asterisk and ellipsis button 2-33
Asterisk button 2-33
Author
alphabetical search 4-19
keyword search 4-13
searching for new records 4-44
Authority

alphabetical
browse list window 4-10
search 4-19
keyword search list window 4-10
record defined 4-4
Authors window 4-10

B
Bar
diacritic
button 3-17
shortcut 3-16, 3-17
menu
toggle example 2-4
overview 2-6
navigation
displaying 2-10
example 1-13, 2-4
for Launcher 2-10
moving 2-11
right-click menu access 2-29
status
defined 2-5
example 2-4
Title 2-5
Toggle Navigation button 2-10
toolbar 2-7
Basics
Horizon 1-10
Microsoft Windows 1-6
Searching 4-12
Bib record
bookmarking 4-35, 4-36
defined 4-4
linked 4-26
saving list 4-35
Bibliographic Detail window 4-11
Bibliographic record
(see Bib record)
Bibliography list
adding an entry 4-35
creating 4-35
deleting an entry from 4-38
printing 4-38
saving
bib records 4-35
item records 4-35
to a file 4-38
viewing 4-36
Bold typeface
collection for 1-5
Bookmark list
adding an entry 4-35
creating 4-35

Index
deleting an entry from 4-38
printing 4-38
saving
  bib records 4-35
  item records 4-35
to a file 4-38
viewing 4-36
Bookmark window 4-36
Boolean operator
  AND
    in compound searches 4-40
    in keyword searches 4-15, 4-40
  OR
    in compound searches 4-40
    in keyword searches 4-15, 4-40
  using for compound searches 4-40
Borrower
  requests
    basics 4-28
    deleting 4-34
    reordering 4-33
Borrower record
  defined 4-4
Borrower Request List window 4-30, 4-31
Borrower Requests button 4-31
Browse
  alphabetical
    title browse list window 4-9
  authority
    alphabetical browse list window 4-10
  keyword in Unicode 4-18
Button
  (see also Option)
  defaults on toolbar 2-7
  disabled 2-16
  Windows operating system 2-5
Buttons
Borrower Requests 4-31
Clear Search String 4-40
Close 1-14
Command Mode 4-42
Detail Status 4-34, 4-35
Display 2-19
Item Queue 4-31
Limit 4-24
Options 1-12
Prev Search 4-27
Redo 2-7
Related Works 4-26
Reorder Queue 4-31, 4-33
Restrict 4-21
Search 4-41
Send To 2-8
Sort 4-22
Toggle Diacritic Button Bar 2-8
Toggle Diacritic Shortcut Bar 2-8
Toggle Full Screen 2-8
Toggle Navigation Bar 2-7, 2-10
Toggle Workbook 2-7
Undo 2-7
View Keywords 4-16
Window Control 2-5

C
Capitalization
  in search terms 4-6
Carryover field 2-42
Cascade menu option 2-14
Case Sensitive ? field 2-40
Cat Type Bib form 2-33
Cataloging
  defined 1-15
  sending data from 3-10
Change User window 1-14
Characters
  entering special 3-14
Check box
  (see Field)
Choose Sort Columns window 4-22
Circulation
  defined 1-15
Clear Search String button 4-40
Click
  defined 1-5
Close button 1-14
Code
  defined 2-25
  hex set digraph example 3-19
  using ALA hex set to enter diacritics 3-18
Code field
  in column display properties 2-20
Code Lookup window 2-25
Collection
  new additions 4-44
Color
  changing text 1-8
Column
  changing in a list window 2-18
  choosing sort order 4-22
  temporarily changing display properties 2-41
Column Selection field 2-46
Columns Separated by Commas option 3-8
Columns Separated by Tabs option 3-8
Command Mode button 4-42
Compound Search window 4-40
Conventions 1-5
Copies window 4-12
Customer Support
  accessing from Help Center 1-5
  fax number 1-5
  phone numbers and web address 1-5
  training 1-6

D
Data
  saving to a file 3-7
  search results sent from 3-10
Index

sending to a process 3-9
Database
searching alternate 4-46
searching using Staff PAC 4-47
Z39.50 4-46
Database field
in the Horizon startup window 1-12
Date
changing or checking Microsoft Windows settings 1-8
format for entering 1-8
Date format mm-dd-yyyy field 2-47
Dates
limiting a titles list 4-25
Default Owner field
in the Login Options window 1-12
Default Value field 2-43
Delete where field 2-47
Descending Sort field 4-22
Desktop icon
element 1-11
Detail Status button 4-34, 4-35
Detail Status window
viewing borrower information 4-35
viewing detailed information about an item 4-35
viewing item information 4-34
Detailed item information 4-34
Diacritic
entering
overview 3-14
with ALA hex set codes 3-18
with keyboard shortcut 3-15
with the button bar 3-17
with the shortcut bar 3-16
printing a list of shortcuts 3-15
Diacritic button bar 3-17
Diacritic Shortcut bar 3-16
Dialog box
(see Windows)
Digraph
element 3-19
Disclaimer 1-4
Display
changing
in a list window 2-18
set window columns and properties 2-19
temporarily changing for a grid 2-41
values 2-20
Display button 2-19
Display Properties group 2-19
Documentation
online version 1-4
sending feedback to SirsiDynix 1-4
Double-click
defined 1-5
Drag
defined 1-5

E
Edit Request window 4-32

Edit window
Codes button
defined 2-24
example 2-24
field
defined 2-24
group
defined 2-24
required fields 2-24
Editable field 2-43
E-mail address
for documentation 1-4
Enabled field 2-42
Exact match search 4-5
Expert Search window 4-42
Explanations
changing color 1-8
Export
contents
of grid or form 2-44
selected grid rows and columns at once 2-45
Export codepage field 2-45
Export file name field 2-45
Export File Type field 2-46
Export to File window 2-44

F
F1 function key
using to access online help 1-5
F10 function key
using to open the Send To menu 2-28, 3-9
F2 function key
using to start a search 2-28, 4-12
F6 function key
using to add a bookmark 4-36
using to cycle through open windows 3-7
F7 function key
using to enter a diacritic 2-28, 3-15
F8 function key
using to move between Circulation windows 3-7
F9 function key
using to activate a process 3-6
using to activate the navigation bar 2-28
Fax number
for Customer Support 1-5
Feedback about this guide
sending to SirsiDynix 1-4
Field
limit a search by 4-23
using a right-click menu in 2-30
Fields
Add delete 2-47
Add go every rows 2-48
Add use database 2-47
Append List 4-40
Carryover 2-42
Case Sensitive ? 2-40
Code
in column display properties 2-20
Index

Column Selection 2-46
Database
  in the Horizon startup window 1-12
Date format mm-dd-yyyy 2-47
Default Owner
  in the Login Options window 1-12
Default Value 2-43
Delete where 2-47
Descending sort 4-22
Editable 2-43
Enabled 2-42
Export codepage 2-45
Export file name 2-45
Export File Type 2-46
Find Cell Containing 2-40
Font Size
  in the Login Options window 1-13
Hidden 2-42
In Column 2-40
Include Column Header 2-46
Label
  in column display properties 2-19
Language
  in the Login Options window 1-12
Limit Text 4-25
Location
  in the Login Options window 1-12
Make Default
  in the Login Options window 1-13
Password
  in the Horizon startup window 1-12
Pickup Location 4-29, 4-32
Position
  in column display properties 2-19
Put Quotes on Each Column 3-8
Replace Cell Text With 2-40
Required 2-42
Reset Grid Configuration from Database 2-43
Right Justify
  in column display properties 2-19
Row Selection 2-45
Search For 4-40
Server
  in the Horizon startup window 1-11
Show Unicode Value 3-19
Suspend Until 4-32
To Position 4-33
Up/Down 2-43
Use ; delim 2-47
User
  in the Horizon startup window 1-11
Value
  in column display values 2-20
Volume 4-26
Width
  in column display properties 2-19
Window Font 1-13
Year 4-26
Figure
  common search paths 4-7

processes in Searching 4-6
File
  opening 3-7
  saving data to 3-7
Find Cell Containing field 2-40
Find/Replace window 2-40
Folder
  Searching
    on the navigation bar 4-6
Font
  changing type and size as login option 1-13
Font Size field
  in the Login Options window 1-13
Form
  Cat Type Bib 2-33
  defined 2-32
  example 2-33
  exporting 2-44
  overview 2-32
  processes that use forms 2-31
  sorting 2-36
  viewing general information about 2-34
Function key
  (see also “F”)
  used in Horizon 2-28

G

Globe drop-down button 2-34
Greater-than symbol ( > )
  using with hex set codes 3-19
Grid
  adding a row 2-35
  defined 2-32
  deleting a row 2-48
  example 2-32
  exporting 2-44
  exporting selected rows and columns at once 2-45
  filtering 2-38
  overview 2-32
  processes that use grids 2-31
  replacing data in 2-40
  requerying or refreshing 2-43
  searching 2-40
  sorting 2-36
  Syntax and Validation 2-32
  temporarily changing display of 2-41
  viewing information about 2-34
  viewing specific information in 2-38
Grid Configuration Options window 2-42
Grid menu options button 2-34
Group
  changing information for multiple items 3-12
  creating a new entry in 2-26
  defined 2-26
  drop-down list
    defined 2-26
  example 2-26
Guide
  conventions 1-5
Horizon Basics Guide

Index

disclaimer 1-4
online version 1-4
overview of chapters 1-3
sending feedback to SirsiDynix 1-4

H

Help
accessing online 1-5
Help Center
accessing 1-5
viewing latest enhancements 1-5
Hex set code
digraph example 3-19
using to enter diacritics 3-18
Hidden field 2-42
Highlight
defined 1-5
Hold
(see Request)
Hold Request window 4-29
Horizon
basic tasks 1-10
changing users in 1-14
icon on the desktop 1-11
logging in 1-11
logging off 1-14
menu
bar 2-6
options 2-6
overview 1-10
process window example 2-4
processes overview 1-14
record ownership 1-16
security overview 1-15
SirsiDynix-maintained servers 1-11
starting a process in 3-3
user interface overview 2-3
windows overview 2-16
Horizon Basics Guide
accessing a PDF version 1-4
viewing from Help Center 1-5
Horizon Customer Relations Manager
contacting 1-5
Horizon Help Center
accessing 1-5
viewing latest enhancements 1-5
Hyphenation
in search terms 4-6

I

In Column field 2-40
Include Column Header field 2-46
Index
	types for searching 4-5
Information Portal
defined 1-15
In-house use
viewing for an item 4-34

Interface
	form
defined 2-32
	grid
defined 2-32
Italic typeface

convention for 1-5
Item
	bookmarking 4-35
	changing information for a group of 3-12
	choosing from list 2-22
	choosing multiple from list 2-22
	requesting 4-28
	saving a list of 4-35
	viewing detailed information 4-34
Item Detail Status window 4-35
Item group
	changing information 3-12
Item Group Editor 3-12
Item Queue button 4-31
Item record
	bookmarking 4-36
Item Request Queue window 4-31, 4-33
Item status
	restricting a search by 4-20
	viewing 4-34
Item type
	restricting a search by 4-20
	viewing 4-34

K

Key
F1
	using to access online help 1-5
F10
	using to open the Send To menu 2-28, 3-9
F2
	using to start a search 2-28, 4-12
F6
	using to add a bookmark 4-36
F8
	using to move between Circulation windows 3-7
F9
	using to activate a process 3-6
	using to activate the navigation bar 2-28
shortcut
in Horizon 2-27
Keyboard
	accessing menu options 2-6
	activating a process with 3-5
	conventions for 1-5
	shortcuts 2-27
	using diacritic shortcuts 3-15
Keyword browse in Unicode 4-18
Keyword list
viewing 4-16
Keyword List window 4-17
Keyword search
  defined 4-5
  doing a basic 4-14
  overview 4-13
  sorting a list 4-22
  using boolean operators 4-15
  using combined indexes 4-15, 4-43
  using multiple words 4-15
  using truncated words 4-15
  viewing keywords for 4-16

L

Label field
  in column display properties 2-19
Language
  changing as login option 1-12
Language field
  in the Login Options window 1-12
Launcher
  example 2-4
  navigation bar on 2-10
  overview 2-4
  positioning windows in 2-13
  right-click menu 2-29
  toolbar 2-7
  window example 1-13
  workbook view 2-15
  workspace 2-12
Less-than symbol (>)
  using with hex set codes 3-19
Limit button 4-24
Limit Text field 4-25
Limiting operator 4-23
Linked bib record 4-26
List
  bookmarks
    deleting 4-38
    printing 4-38
    saving to a file 4-38
    viewing 4-36
  choosing
    items 2-22
    multiple items 2-22
  of keyword search terms 4-16
  of titles, limiting 4-22, 4-25
  printing 2-18
  saved bibliography
    printing 4-38
    viewing 4-36
  saving titles 4-35
  sorting 2-21, 4-22
  viewing
    bookmark 4-36
    borrower request 4-31
    title request 4-31
List window
  columns
    changing 2-18

M

Main Search window
  example 4-9
  overview 2-16
Make Default field
  in the Login Options window 1-13
Manual
  conventions 1-5
  disclaimer 1-4
  online version 1-4
  overview of chapters 1-3
  sending feedback to SirsiDynix 1-4
Menu
  accessing with shortcut keys 2-27
  bar example 2-4
  opening 2-6
  right-click 2-29
Menu option
  using right-click to access 2-29
Menu options
  Cascade 2-14
  Send To 3-9
  Smart Tile 2-14
  Tile Horizontally 2-13
  Tile Vertically 2-13
Misspelled search terms 4-14
Module
  (see Process) 1-14
Mouse
  accessing menu options 2-6
  activating a process with 3-4
  click
    defined 1-5
  conventions for 1-5
  double-click
    defined 1-5
  drag
    defined 1-5
  highlight
    defined 1-5
  right-click
    defined 1-5
  Multiple keyword searching 4-15
Index

N
Navigation bar
  basics 2-10
  displaying or hiding 2-10
  displaying the Shortcut column 3-5
  example 1-13, 2-4
  moving 2-11
  right-click menu for 2-29
New collection additions 4-44

O
Online documentation 1-4
Online help
  accessing 1-5
  Horizon Help Center 1-5
Operator
  boolean in keyword search 4-15
  for limiting searches 4-23
  question mark 4-16
  truncating searches with asterisks 4-16
  using parentheses 4-15
Option
  As Displayed 3-8
  Columns Separated by Commas 3-8
  Columns Separated by Tabs 3-8
  Use Database Names 3-8
Options button 1-12
OR
  Boolean operator 4-15
  broadening searches
    field 4-40
    in Compound Search window 4-40
    in Expert Search window 4-42
    overview 4-15
Owner
  changing as a login option 1-12
Ownership
  (see also Record ownership)
  defined for records 1-16

P
PAC (Public Access Catalog) 1-15
Parentheses
  in multiple keyword searches 4-15
Password
  specifying at login 1-12
Password field
  in the Horizon startup window 1-12
Path
  common search 4-7
PDF version of Horizon guides
  accessing from Horizon 1-4
  accessing from SirsiDynix web site 1-4
Pencil and ellipsis button 2-34
Phone number
  for Customer Support 1-5
Pickup location
  changing for a hold request 4-32
Pickup Location field 4-29, 4-32
Position field
  in column display properties 2-19
Prev Search button 4-27
Previous search
  conducting 4-27
Previous Searches window 4-27
Process
  activating
    an open window 3-7
    using a mouse 3-4
    using the keyboard 3-5
  disclaimer 1-4
  for grids and forms 2-31
  overview 1-14
  searching 4-6
  security 4-7
  starting
    in Horizon 3-3
    using a mouse 3-4
    using the keyboard 3-5
  windows
    overview 2-16
    right-click menu access 2-30
Public Access Catalog (PAC) 1-15
Publication date
  in a bib record 4-4
  limiting a search by 4-22, 4-25
  sorting list by 4-22
Punctuation
  in search terms 4-6
  using asterisks 4-16
  using parentheses 4-15
  using question marks 4-16
Purchase order
  defined 4-4
Put Quotes on Each Column field 3-8

Q
Question mark ( ? )
  in truncated searches 4-16
Queue
  reordering request 4-33

R
Radio button
  (see Option)
Receiver
  defined 3-9
Record
  authority
    defined 4-4
  bib
    bookmarking 4-35
    defined 4-4
Index

borrower
  defined 4-4
purchase order 4-4
types you can search for 4-4
Record ownership
  (see also Ownership)
  defined 1-16
Redo button 2-7
Related Works button 4-26
Related Works window 4-27
Remote site access
  using Z39.50 4-46
Reorder Queue button 4-31, 4-33
Reorder Request Queue window 4-33
Replace Cell Text With field 2-40
Request
  deleting 4-34
  editing 4-32
  making 4-28
  queue
    reordering names 4-33
  viewing
    list 4-30, 4-31
    title 4-31
Request queue
  deleting requests 4-34
  reordering requests 4-33
Required field 2-42
Required fields
  in edit window 2-24
 Reserve Bookroom (RBR)
  searching as separate database 4-47
Reset Grid Configuration from Database field 2-43
Restrict button 4-21
Restrict Title Display window 4-21
Restrictions
  for a search
    applying 4-20
    removing 4-19
Right Justify field
  in column display properties 2-19
Right-click
  defined 1-5
  using to access menu options 2-29
Row
  adding 2-35
  deleting 2-48
Row Selection field 2-45

defined 4-5
title 4-18
title browse list window 4-9
alternate databases 4-46
authority
  alphabetical browse 4-10
  basic 4-12
  broadening 4-15
  choosing 4-5
  compound 4-40
  doing a basic 4-12
  doing a previous 4-27
  exact match 4-5
  expert 4-42
  features 4-20
  finding fewer titles 4-15
  finding more titles 4-15
  index 4-5
  keyword
    defined 4-5
    overview 4-13
    using combined indexes 4-15, 4-43
  limiting
    by volume 4-25
    overview 4-22
    using operators 4-23
    value 4-23
  main window 4-9
  multiple keyword 4-15
  narrowing 4-15
  new additions 4-44
  option 4-5
  overview 4-3
  paths illustration 4-7
  previous 4-27
  processes 4-6
  record types 4-4
  removing restrictions 4-19
  restricting 4-20
  sending data from 3-10
  setting up 4-4
  truncated
    with asterisk 4-16
    with question mark 4-16
  types 4-5
  viewing keywords list 4-16
  Z39.50 database 4-46
Search button 4-41
Search For field 4-40
Search Limit window 4-24
Search Message window 4-41
Search path
  alphabetical
    title browse list window 4-9
Authority
  keyword search list window 4-10
authority
  alphabetical browse list window 4-10
Bibliographic Detail window 4-11
Copies window 4-12
Index

diagram of common 4-7
Main Search window 4-9
navigating through windows 4-7
Title list window 4-11
Search string
  defined 4-42
  displayed 4-40
  example 4-40
  result list box 4-40
Search term
  capitalization 4-6
  entering 4-6
  hyphenation 4-6
  misspelled 4-14
  punctuation 4-6
  significant digits 4-6
  truncated 4-15
  using previous 4-27
Search window
  accessing 4-9
  accessing with a function key 2-28
  overview 2-16
  types 4-8
Security
  overview 1-15
Select filter for grid contents window 2-38
Send To button 2-8
Send To menu option 3-9
Serials
  defined 1-15
  sending data from 3-10
  volume search 4-25
Series
  alphabetical search 4-19
  keyword search 4-13
  new records search 4-44
Server
  specifying at login 1-11
Server field
  in the Horizon startup window 1-11
Shortcut
  displaying shortcuts in navigation bar 3-5
  for activating processes 3-5
  for entering diacritics
    from the Diacritic Button bar 3-17
    from the Diacritic Shortcut bar 3-16
    from the keyboard 3-14, 3-15
  for menu option 2-27
  keys 2-27
  overview of use in Horizon 2-27
  standard Windows used in Horizon 2-28
  using function keys with 2-28
Show Unicode Value field 3-19
Significant digits
  in search terms 4-6
SirsiDynix
  Customer Support
    accessing from Help Center 1-5
    fax number 1-5
    phone numbers and web address 1-5
  training 1-6
Size
  changing font as login option 1-13
  Smart Tile menu option 2-14
  Smart Tile window 2-14
Sort
  descending order 4-22
  List window 2-21
  Titles list 4-22
  Sort button 4-22
  Staff PAC
    (see Staff searching)
  Staff searching
    using Staff PAC as stand-alone program 4-47
Status bar
  defined 2-5
  example 2-4
Subject
  search
    alphabetical 4-19
    keyword 4-13
    new records 4-44
Subjects window 4-10
Support
  phone numbers 1-5
  Suspend Until field 4-32
  Syntax and Validation grid 2-32
T
Tab
  displaying at bottom of Launcher 2-15
Telephone number
  for Customer Support 1-5
Text color
  changing 1-8
Tile Horizontally menu option 2-13
Tile Vertically menu option 2-13
Title
  bookmarking 4-35, 4-36
  limiting a list 4-22, 4-25
  saving a list 4-35
  search
    alphabetical 4-18
    alphabetical browse list window 4-9
    keyword 4-13
    new records 4-44
  sorting 4-22
Title bar
  defined 2-5
  example 2-4
Title request list
  viewing 4-31
Titles list window 4-11
Titles window 4-11
To Position field 4-33
Toggle Diacritic Button Bar button 2-8
Toggle Diacritic Shortcut Bar button 2-8
Toggle Full Screen button 2-8
Toggle Navigation Bar button 2-7, 2-10
Toggle Workbook button 2-7
Toolbar
   default buttons 2-7
   displaying or hiding 2-9
   example 2-4
   explained 2-7
   moving 2-9
   right-click menu 2-29
Truncation
   definition 4-15
   using asterisks 4-16
   using question mark 4-16
Tutorial for Windows 1-6

U
Undo button 2-7
Unicode sorting 4-18
Up/Down field 2-43
Use ; delim field 2-47
Use Database Names option 3-8
User
   changing on a Horizon workstation 1-14
User field
   in the Horizon startup window 1-11
User interface
   grids and forms 2-31

V
Value
   using to limit searches 4-23
Value field
   in column display properties 2-20
View Keywords button 4-16
Volume
   limiting a search by 4-25
Volume field 4-26
Volume Search window 4-26

W
Warning
   unattended workstation risk 1-14
Width field
   in column display properties 2-19
Window
   (see also Edit window, List window, Search window)
      activating an open process 3-7
      changing size 2-15
      changing text color 1-8
      cycling between 3-7
      disclaimer 1-4
      example 1-8
      font
      changing as login option 1-13
      grids and forms 2-31
      Horizon process example 2-4
      moving to another location 2-15
      positioning in the Launcher 2-13
      positioning in workspace 2-12
      search paths 4-8
      set columns and properties for display 2-19
      sorting a list 2-21
Window Control button 2-4, 2-5
Window Font field 1-13
Windows
   Alphabetical Titles 4-9
   Approval Required 1-16
   Authority
      keyword search list 4-10
   Authors 4-10
      alphabetical browse 4-10
   Bibliographic Detail 4-11
   Bookmark 4-36
   Borrower Request List 4-30, 4-31
   Change User 1-14
   Choose Sort Columns 4-22
   Code Lookup 2-25
   Compound Search 4-40
   Copies 4-12
   Detail Status 4-35
   Display Properties 1-9
   Edit Request 4-32
   Expert Search 4-42
   Export to File 2-44
   Find/Replace 2-40
   Grid Configuration Options 2-42
   Hold Request 4-29
   Item Detail Status 4-35
   Item Request Queue 4-31, 4-33
   Keyword List 4-17
   Launcher 1-13, 2-4
   Login Options 1-12
   Main Search 4-9
   Previous Searches 4-27
   Related Works 4-27
   Reorder Request Queue 4-33
   Restrict Title Display 4-21
   Save List 3-8
   Search Limit 4-24
   Search Message 4-41
   Select filter for grid contents 2-38
   Smart Tile 2-14
   Subjects 4-10
   Titles 4-11
   Volume Search 4-26
   Z39.50 Search 4-46
Windows Display Properties window 1-9
Windows operating system
   basics 1-6
   buttons 2-5
   changing or checking date settings 1-8
   changing text color 1-8
   standard shortcuts 2-28
   Unicode support 4-18
Workbook
   example 2-4
   view
Index

Horizon Basics Guide

tabs 2-15
  tabs at bottom of Launcher 2-15
Workspace
  example 2-4
  in Launcher 2-12
  increasing size 2-12
  positioning windows in 2-12
Workstation
  unattended risk warning 1-14

Y

Year field 4-26

Z

Z39.50
  searching 4-46
  using for remote sites 4-46
Z39.50 Search window 4-46