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Getting Started

This chapter provides you with the basic information you need to begin using Horizon’s administration tools. It gives you an overview of this guide and explains basic Horizon and system administration tasks. It also explains how to view and change information in your database using the Horizon Table Editor.

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Getting Help 1-6
Horizon Basics 1-7
System Administrator Basics 1-8
Horizon Table Editor 1-12
Welcome

Welcome to the Horizon System Administration Guide. This guide gives you the information you need to effectively access and manage your library’s databases with the Horizon system.

Before you can manage your library’s databases, you must have a thorough understanding of the Table Editor, the Horizon application that directly accesses your library’s database or databases. Once you understand how the Table Editor works, you need to set up Horizon to accommodate all the different functions of your library.

About This Guide

The System Administration Guide is for administrators of the Horizon system. It explains general, system-wide tasks for setting up and maintaining Horizon. For information about setting up specific functions within Horizon (such as Cataloging, Circulation, or Acquisitions), see the Setup guide for that function. For setup and administration-related tasks for add-on products (such as Inventory or Community Resources), see the user’s and administrator’s guide for that product. 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,” provides you with the basic information you need to begin using Horizon’s administration tools. It gives you an overview of this guide and explains basic Horizon and system administration tasks. It also explains how to view and change information in your database using the Horizon Table Editor.

- Chapter 2, “General Setup,” explains the system parameters and defaults you must set up for your Horizon system to work. You may need to set up some parameters and defaults in this chapter only once; others you may need to change periodically.

- Chapter 3, “Searching Setup,” explains how to set up staff searching. You can define the functionality and appearance of searching for your staff users.

- Chapter 4, “Indexing,” explains how your Horizon system uses indexes to help you search for and display search results. It also explains how to create indexes from scratch.

- Chapter 5, “Security and Preferences,” explains how to set up security and preference groups for users on your Horizon system.

- Chapter 6, “Maintenance and Day End,” explains the tasks you should do to properly maintain your Horizon system and when they should be done. It also explains how to use Day End processing, how to create statistical reports, and how to get help for problems that arise while using Horizon.

- Chapter 7, “Introduction to Horizon Views,” explains how to work with Horizon views (or windows) including displaying list and edit views, reconfiguring views, adding columns and
groups to views, and creating alternate views.

- Appendix A, “Horizon Views,” contains a list of Horizon views and the windows those views configure.
- 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, call your Horizon Customer Relations Manager to receive one. (For contact information, see “Getting Help” on page 1-6.)

**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 Horizon Customer Support.
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 the choices you made during implementation and changes you may have made since then. (For example, you 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, \texttt{ALT+H} means to hold down the \texttt{ALT} key and press the \texttt{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.)
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- 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.)

- The steps for accessing and changing views in the Table Editor are similar for most tasks. Instead of repeating similar steps throughout the guide, this guide assumes that you are familiar with the Table Editor tasks explain in the “Horizon Table Editor” on page 1-12. For tasks without steps, this guide shows you the name of the view in the Table Editor, and where the view’s process is located on the navigation bar. Here is an example:

<table>
<thead>
<tr>
<th>View:</th>
<th>matham</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process:</td>
<td>Administration\System Setup\Matham - System Wide Parameters</td>
</tr>
</tbody>
</table>

You can choose to access the view either by entering the view name in the Table Editor, or by choosing the process from the navigation bar. If no process is listed, you need to use the Table Editor to access the view.

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 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 “http://www.clientcare.sirsidynix.com”.

Horizon Basics

This guide assumes you have a basic knowledge of your Windows operating system, Horizon, and working in Horizon windows. At the minimum, you should know how to:

• Use a mouse or keyboard to do basic tasks, such as choosing menu options and buttons.
• Work with windows (selecting, moving, minimizing, restoring, maximizing, sizing, scrolling, closing, and so on).
• Work with dialog boxes.
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- Log in to Horizon, change operators, and log off Horizon.
- Search for records on the Horizon system.
- Work in Horizon list and edit windows.

**NOTE**

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

Additionally, you should know how to:
- Use the Launcher environment, including activating a Horizon process.  
  (For more information on working in the Launcher environment, see the *Horizon Basics Guide*.)
- Customize the Launcher, as necessary.  
  (For instructions, see the *Launcher Configuration Guide*.)

### System Administrator Basics

In order for Horizon to work properly, your library system needs to meet some basic system requirements. The type of hardware you use will affect system response times. This is critical if you have multiple databases and complex search requirements. For more information on basic system requirements and equipment, see one of these guides:

- If you are a new customer or are setting up a new workstation for Horizon, see the *Horizon Implementation Guide*. If you need further assistance, contact the SirsiDynix Implementation team. (For more information, see “Getting Help” on page 1-6.)
- If you are an existing customer and are upgrading to a new version of Horizon, see the *Release Notes* for your current release for the equipment specifications and the procedures required. If you need further assistance, contact the SirsiDynix Upgrade team. (For more information, see “Getting Help” on page 1-6.)

Before you do other system administrator tasks, you need to set up the Andale WT J font on your print server. Also, if you plan to use Horizon to make records available in multiple languages, you need to become familiar with the Horizon’s Unicode capabilities which allows your library to have great flexibility in displaying unique characters for other languages.

**NOTE**

The primary tool that you will use to set up and perform system administration tasks in Horizon is the Table Editor. The Table Editor is explained in “Horizon Table Editor” on page 1-12.

This section explains these topics:

- Setting Up the Andale WT J Font
- Learning About Horizon’s Unicode Capabilities
Setting Up the Andale WT J Font

The Andale WT J font must be copied onto your print server after Horizon installation. The licensing for this font covers all staff workstations being serviced by your print server. If this font is not on your print server, the server must spool the entire font each time it is needed. Since this font is a 20 MB file, this will adversely affect the printing speed of notices and other print jobs.

To set up the Andale WT J font

1. Open the fonts folder on the Horizon Installation CD.
2. Locate the Andale WT J font within the font folder.
3. Right-click on the Andale WT J font, hold down the right mouse button, and drag it to the print server for your staff workstations.

NOTE

The cut and paste menu options do not exist within the font folder. Make sure that the copy icon (a box with a cross in it) appears near the mouse pointer during your drag and drop operation. Do not cut or delete the Andale WT J font from its original location.

Learning About Horizon’s Unicode Capabilities

Unicode is an encoding standard that lets you store and display multilingual text on your computer. It lets users exchange computer files across international borders more easily, and display computerized information written in many languages more accurately.

Unicode includes codes for the characters of the world’s major languages, including their classical forms. This lets users display and store characters that are not available from a typical codepage. (A codepage tells your computer which set of language characters to use as display characters.) (For example, if your computer uses the Russian codepage 866, it can display and store Russian characters but not French characters. Unicode allows your computer to display and store all language characters.)
Horizon can store and display MARC records in Unicode. However, your workstation must be able to handle Unicode. One Unicode font is available in Windows NT. Horizon ships with an additional Unicode font. Others are available online or from font companies.

**IMPORTANT**

You must be running Windows NT 4.0, Windows 2000 Professional, or Windows XP Professional to use Unicode. You must also specify a Unicode font when you log in to Horizon. (For instructions, see “Logging In to Horizon” in the “Getting Started” chapter of the *Horizon Basics Guide.*)

**NOTE**

Horizon lets you create a browse index that lets you sort and display Unicode characters. (For more information, see “Creating a Collation Key Index” on page 4-7.)

This section explains these topics:

- Saving Files in Unicode
- Displaying Data in Unicode

### Saving Files in Unicode

In areas of Horizon where you have the option to save a file, you may also have the option to save the file in Unicode. When you save a file in Unicode, any file you save as a new file or any file you save over another existing file, thereby replacing it, is saved as a Unicode file.

If you do not save the file in Unicode, the file is saved in the codepage character set that matches the character set of your database. (For example, if your computer is using the Russian codepage 866, the file is saved in Russian.) (For more information on codepages, see your Windows user guide or Windows online help.)

If you select an existing file and choose to append the open file to the existing file, the appended file matches the saved format of the existing file.

You can save files in Unicode in several areas of Horizon, including:

- **Circulation Reports.** You can save notices as an e-mail file, or save reports to a file.
- **Serials Control.** You can export a prediction pattern.
- **Staff searching.** You can save a bib record to a file.

**IMPORTANT**

If the system to which you are sending a file (such as an e-mail program, a BISAC or EDIFACT electronic order, or another utility) cannot display Unicode, you should not save your file in Unicode. Characters that cannot export in Unicode format will be displayed as an asterisk (*).

**To save files in Unicode**

1. In Horizon, display the information you want to save as a file.
(For example, use the New Search process to find a bib record that displays foreign characters.)

2 Choose **File, Save to File**.
   Horizon displays the Save to a File window.

3 Mark the **Save as Unicode** box.

4 Do one of these options:

<table>
<thead>
<tr>
<th><strong>To save a new file in Unicode</strong></th>
<th><strong>To replace an existing file, or append new information to an existing file</strong></th>
</tr>
</thead>
</table>
| 1 Enter the file name in the **File name** field.  
2 Click **Save**.  
The file is saved in Unicode format. | 1 Click an existing file name.  
The file name appears in the File name field.  
2 Click **Save**.  
A window opens asking if you want to Overwrite, Append, or Cancel the save.  
3 Do one of these options:  
  • Click **Overwrite**.  
    Windows saves the new information in Unicode format, and deletes the original file.  
  • Click **Append**.  
    Windows attaches the new information to the end of the original file in the same format as the original file. |
Displaying Data in Unicode

Horizon can import codepage files, Unicode files, and MARC format files. (A codepage tells your computer which set of language characters to use as display characters. For more information, see your Windows user guide or Windows online help.) In the case of MARC records, Horizon uses Unicode to translate the characters and display them properly. However, the number of characters available for display is dependent on the font used on your workstation. One Unicode font is available in Windows NT. Horizon includes an additional Unicode font.

Characters that cannot display in Unicode appear as asterisks (*). Horizon saves the code for any of these characters with the file so that when a Unicode capable font is used, whether on the Horizon workstation or on another computer to which you have exported the file, the character will appear correctly.

*WARNING*

All Horizon applications running on the same workstation must use the same system font. (Changing the font for MARC record display in the MARC Editor does not affect the system font setting.) Do not switch from one system font to another when Horizon is running. Be sure to shut down all Horizon applications before switching to another font.

Horizon Table Editor

The Horizon Table Editor is an application that directly accesses your library’s database. It lets you list, select, and edit database tables without having to learn the Structured Query Language (SQL) that is used by Horizon. To understand the purpose and functions of the Table Editor, you must understand these concepts:

- **Database Tables.** Sybase or Microsoft SQL Server (the software used to manage your database) stores and organizes your library’s raw data in tables. A table is a two-dimensional array or form consisting of rows and columns. Each row in a table represents a specific record, and each column in a table stores a piece of information (field) in that record. A table is simply a way of organizing like data together. (For more information on tables, see the Table Structures Guide.)

- **Table Editor.** The Table Editor is an organized, graphical view of your library’s raw data. You view this raw data in the Table Editor in windows called views. Views are not tables in your database; they are simply a window or look into the table. (For more information on views, see “About Introduction to Horizon Views” on page 7-3.)
You can display views in the Table Editor in these two forms:

- **Lists.** Lists display the records as rows in the table. This sample window shows a list for the collection table:

![List: Collection Codes]

Each collection record on the list is a row in the collection table.

- **Edit records.** Edit records expand a single row into greater detail. This sample window shows an edit record for a selected collection from the table:

![Edit: Collection Codes]

Fields represent columns for a row.

In addition to displaying views in the Table Editor, you can edit a table’s data in the Edit records in views. You can directly add or delete data in columns by editing fields in views. Before you change any views, you need to understand how tables are interconnected.
These interconnections must be considered when changing table data. (For example, the collection table uses information from the istat table and the call_type table.) Here is an example of the relationship between tables:

![Figure 1.1: Table Interconnections]

This interconnected relationship between tables has three results:

- **You must create some tables before other tables.** In the example in Figure 1.1: Table Interconnections, data in the Call No. Type table and data in the Item Stat Class table must exist before you set up your collections.

- **The Codes buttons on some tables let you work with several interconnected tables at once.** For example, if an ISTAT that you need for setting up a collection does not yet exist, you can choose the Codes button in the Collection view and create the ISTAT. You can then enter that ISTAT in the field in the Edit Collection Codes window.

- **When you edit or delete rows in one table, you may first need to edit or delete rows in linked tables.** In effect, you work backwards when editing or deleting table data. In the example in Figure 1.1: Table Interconnections, to delete the ISTAT “Per Art,” you would first have to delete all collection table items that include the ISTAT “PerArt.” Then you could delete the “PerArt” ISTAT.

**IMPORTANT**

Whenever you make a change to Horizon setup, you should exit Horizon and restart it on any workstation where you want the change to take effect.

This chapter explains these topics:

- Opening a View in the Table Editor
- Using the List Search Window
- Doing a Compound Search
- Using SQL Statements in the Table Editor
- Table Editor Menu Options
Opening a View in the Table Editor

Once the Table Editor is running, you open a view by entering its name in the Code Lookup Horizon View window. Once you know the name of the view, use this method to open any view.

**NOTE**

You can access some database tables through views in other processes. (For example, you view data from the borrower table in the Edit Borrower window in Circulation. For a more detailed description of views, see “About Introduction to Horizon Views” on page 7-3.)

**To open a view in the Table Editor**

1. Log in to Horizon.
2. Start the Table Editor process.

   The default location of this process is the Administration folder on the navigation bar. Horizon displays the Code Lookup Horizon View window. This window lists all views in the Horizon system:

   ![Code Lookup: Horizon View](image)

   Views are listed alphabetically by view name.

   ![Code Lookup: Horizon View](image)

   **NOTE**

   In general, the name of the view is similar to the name of the table it is a view of. (For example, the collection view is a view of the collection table.) Some views, on the other hand, do not have the same name as the table they are a view of. (For example, the add_fee view is a view of the burb table.)
3  Do one of these options to move the selection arrow to the view name you want:
   • Enter the first few letters of the view name in the Mq View field.
   • Enter the view name, including any underscore dashes, in the Mq View field.
   Horizon places the selector arrow next to the view name in the list.

4  Click OK.
   Horizon displays the list window, overlaid by a search window if the table contains many rows.
   (For instructions on narrowing a search in a table that has many rows, see “Using the List Search Window” on page 1-16.)

Using the List Search Window

The List Search window lets you search for specific rows by a selected column in the table. It is available from any list window by choosing the Search command from the File menu or pressing CTRL+F2:

The List Search window lets you narrow the entries in the list for printing simple reports about your library’s data.

If you want to view all rows, click Cancel in the List Search window to close it. You are canceling the search to narrow the list, not canceling the list itself.

This section explains these topics:
   • Narrowing a List by an Index
   • Narrowing a Search Using Truncation
   • Using an Entry Aid
Narrowing a List by an Index

An index is one of the columns in the table. You can narrow a list by information stored in one of the columns or indexes. The List Search window lists these indexes. Because the columns vary in each table, the indexes that appear in the List Search window vary for each table you have open. (For example, you could limit a list of borrowers by location.)

To narrow a list by an index

1. Open the view to list the rows. 
   (For instructions on displaying the list window, see “Opening a View in the Table Editor” on page 1-15.)

2. Press CTRL+F2 to open the List Search window.

3. Choose an index you want to limit the list by.

4. In the Search for field, enter the value stored in that index for which you want to list all rows that contain that value.
   (For example, if you were limiting the collection table to list only those rows or records that have 10 as the number of items in a certain collection, you choose the No. of Items index in the List Search window for the List Collection window and enter “10” in the Search for field. The List Collection window displays only those collections that have 10 items.)

5. Click OK.

Horizon displays those rows that match the limit.

When you are limiting by a code, such as BTYPE, location, collection, and so forth, you must enter the exact code. (For instructions, see “Using an Entry Aid” on page 1-18.) When you are limiting by free text, such as borrower name or BTYPE description, you should precede and follow the text in the Search for field with an asterisk. (For more information, see “Narrowing a Search Using Truncation” on page 1-17.)

Narrowing a Search Using Truncation

Some of the List Search indexes require you to enter a text string. Since you may not always know the exact string, the List Search window recognizes special “wildcard” characters to take the place of words or letters you do not know. The two wildcard characters you can use are:

- **Asterisk** (*). An asterisk represents any combination of one or more characters.

- **Percent sign** (%). A percent sign represents any single variable character in a search string.

These wildcard characters let you match partial words or phrases against an entire string. Depending on the location of the “unknown” characters, you may place a wild card at the beginning, middle, or end of a search string. You can even place multiple wildcard characters at different points in the string. (For example, to list all collections relating to audio materials, you can select the description search [which contains descriptions of all the collections in Horizon] and enter the truncated keyword: “*audio*”)

Enter an asterisk before and after the search terms since many of the terms may be preceded by other words. (For example, if you were to enter “audio*”, Horizon would find only those records where the description contains the term “audio” first and that term may appear in the middle or at the end of the description.)

As an example for using a percent sign, suppose you are searching for a borrower named Clark Jenson, but you do not know whether the last name ends in “sen” or “son.” You can use the percent sign to enter this search string and Horizon will find all last names of Jensen that end in either “sen” or “son.” The search value would be: “*jens%n*”
In this example, because the name field actually contains more than just the last name, you need to use asterisks as well to replace any additional information, such as first name and titles.

**Using an Entry Aid**

Some search indexes on the List Search window require one of a set of values or codes. You can recognize these fields when the Entry Aid button is enabled. An entry aid is a list of predefined values valid for the column (index) or an entry field for specifying date or time ranges. You can recognize columns that require an entry aid when the Entry Aid button is enabled. When you press an active Entry Aid button, the List Search window displays a window that lets you choose a valid value, or range of values, for your search index. The button is active when it has one of these labels:

- **Show Codes.** Provides a list of relevant codes. You can choose a code from the list for columns that accept predefined codes only. This helps to ensure data consistency (similar to authority control).
- **Show Values.** Lists possible values. Some columns contain choices. (For example, will items be loaned on a daily or hourly basis?) When you are given a choice, all the possibilities are listed.
- **Date Range.** Accepts a date (or date range) to specify whether to search for dates prior to, since, or within that range.
- **Time Range.** Works similarly to the Date Range, except that it uses an hourly range rather than a date range.

**To use an entry aid**

1. Open the view to list the rows.
   (For instructions on displaying the list window, see “Opening a View in the Table Editor” on page 1-15.)
2. Press **CTRL+F2** to open the List Search window.
3. Choose an index that requires a code, a time, or a date.
4. Click the **Entry Aid** button.
   The name of the button will correspond with the type of index that you selected.
5 Do one of these options:
   • If the Table Editor displays a list of codes, choose the code by which you want to limit
     the list.
   • If the Table Editor displays a time or date range window, choose the range (Prior to,
     Since, or Range), then enter the dates.

You can use truncation with codes. (For instructions, see “Narrowing a Search Using
Truncation” on page 1-17.)

6 Click OK.
   Horizon displays those rows that match the limit.

---

**Doing a Compound Search**

If you want to, you can do a compound search and choose multiple indexes to search on. You can
expand or narrow your search options by choosing Boolean operators. This lets you search
multiple criteria at once without having to conduct individual searches on each index.

**To do a compound search**

1 Open the view to list the rows.
   (For instructions on displaying the list window, see “Opening a View in the Table Editor”
on page 1-15.)

2 Choose File, Compound Search, or press ALT+F2 to open the Compound Search window.
   This is an example of the Compound Search window:

   ![Compound Search Window](image)

   Choose one of these
   Boolean operators to
   insert them within
   your search.

   Horizon displays
   your search string.

   Click here to clear
   the search string
   and enter a new
   search.

   Click here to add
   new search results
   to the current ones.

   Click here to review
   your previous searches.

   Some indexes give
   you entry aids. (For
   example, click Date Range to enter a range of
   statement dates that you want to find.)
3 In Indexes, highlight a search index.
4 Enter a search term in the Search for field.
5 Do one of these options:
   • Mark AND to narrow a search.
   • Mark OR to broaden a search.
6 If you want to add new results to the current ones, click Append List.
   This box is not checked when the Compound Search window is first opened. If you check it, it remains checked until you clear it, close the Table Editor window, or do a search on a different view. If you choose a previous search that had the Append List box checked, it will be checked when you use that search again.
7 Repeat steps 2 through 6 until your search string is complete.
   Horizon displays your search string as you enter it. You can enter up to 300 characters.
8 Click Search.
   Horizon displays a list of statements that match your search term.

Using SQL Statements in the Table Editor

In the Table Editor, you can use SQL statements to restrict the contents of a list window to those that match certain criteria. The Table Editor does not let you use full SQL statements; however, it does let you use basic “where” clauses to locate specific information. This section explains the basic concepts you need to understand about where clauses and explains how to use a “where” clause to search for rows.

This section explains these topics:
   • Where Clause Formula
   • Table Columns and Values
   • Basic SQL Grammar
   • Using a Where Clause to Search for Rows

Where Clause Formula

If you were to work directly with the database through Sybase or Microsoft software rather than through the Table Editor, you would use sentences, referred to as transaction statements, to find and modify table information. The Table Editor is designed so you do not have to know or use transaction statements.

For example, when you search in Circulation for a borrower, you point and click at a search option then enter the search string. Underneath, Sybase or Microsoft creates a transaction statement that yields the results. To search for borrowers whose record numbers are 45 or lower, this is the SQL statement:

“select name from borrower where borrower# < 45”

When searching in Horizon, you do not need to know the table and column names and how the information you want relates to the column (that is, whether the column that contains the information is less than or greater than that information, and so forth); you do need to know this when searching in the database through Sybase or Microsoft software.
Although the Table Editor does not let you use full SQL statements, it does provide a command for you to use basic “where” clauses—clauses that locate data from a table where a column contains certain information.

This is the where clause formula:

“select row_name from table_name
where column_name = value”

You only enter the second half of the formula (“where column_name = value”).
Table Columns and Values

You also need to know what columns you can search and the values stored in those columns. Sometimes those values are codes, such as “main” for location. Sometimes they are numbers or small integers.

(For example, the circulation privilege column in the circulation_privilege_code table has 26 different privileges [loan period, fine rate, etc.]. Each loan privilege is assigned a number. Loan privilege is 0, renewal period is 1, and so on. If you do not know the value, open the view for the table and display the Values group; it lists the value for each option in the column.)

Basic SQL Grammar

Finally, you need to know some basic SQL syntax, including signs that let you construct a valid SQL statement. These are some commonly used signs:

<table>
<thead>
<tr>
<th>Sign</th>
<th>Means</th>
<th>Examples</th>
</tr>
</thead>
</table>
| =    | The value stored in the column matches the value entered to the right of the equal sign. | circ_privilege = 0  
location = “main” |
| <>   | The value stored in the column matches those less than or greater than the value entered to the right of the less than or greater than sign. | circ_privilege < 4  
borrower# > 150 |
| ””   | Quotation marks surround a coded or free text value. | location = “main”  
borrower_name = “wilson” |
Using a Where Clause to Search for Rows

You can enter SQL statements in the Selection Criteria window to restrict the contents of a list window to those that match certain criteria. You must understand basic SQL and the structure of the table to use the Selection Criteria window. (For more information about SQL statements, see your Sybase or Microsoft documentation. For more information on the table structure, see the Table Structures Guide.)

To use a where clause to search for rows

1. Open the view to list the rows.
   (For instructions on displaying the list window, see “Opening a View in the Table Editor” on page 1-15.)
2. Choose File, Where clause, or press SHIFT+F2 to open the Selection Criteria window:

   ![Selection Criteria Window](image)

3. Enter the column_name, sign, and value you want to limit the list by.
   Here are some examples:

<table>
<thead>
<tr>
<th>To search for this</th>
<th>Enter this</th>
</tr>
</thead>
<tbody>
<tr>
<td>The loan period for all locations</td>
<td>circ_privilege = 0</td>
</tr>
<tr>
<td>The loan period and renewal loan period for all locations</td>
<td>circ_privilege = 0 or circ_privilege = 1</td>
</tr>
<tr>
<td>The loan period and renewal loan period for a particular location</td>
<td>(circ_privilege = 0 or circ_privilege = 1) and location = “location_name”</td>
</tr>
<tr>
<td>All borrowers who belong to a specific location and are of a particular BTYPE</td>
<td>location = “location_name” and btype = “btype_code”</td>
</tr>
</tbody>
</table>

4. Click OK.
Horizon returns to the list and displays those rows that match the “where” clause parameters.

**WARNING**
The Table Editor displays messages that report SQL syntax errors. For those who understand SQL and are willing to examine the database to discover how the underlying tables function, this option gives maximum flexibility in restricting the contents of a list. If you misuse the Where Clause command, you may get a long result list, an error message, or nothing at all. In the worst case, you would get a list that is too long and the program would crash.

### Table Editor Menu Options

This section describes the menu options on these Table Editor menus:

- Help Menu
- Edit Menu
- Window Menu
- Help Menu

#### File Menu

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Saves any changes to an edit window without closing the window. This option is active only when you have made at least one change to a record.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes an edit window and prompts you to save any changes. This command is the same as the Close button in an edit window.</td>
</tr>
<tr>
<td>Close All</td>
<td>Closes all open windows and prompts you to save any changes.</td>
</tr>
<tr>
<td>Search PAC</td>
<td>Opens the staff searching Search window.</td>
</tr>
<tr>
<td>Print</td>
<td>Displays a Print window for you to print the list of rows in the displayed list window. This is a convenient way to create reports.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td>Note that Print prints the whole list, regardless of what is selected. To print a specific list, use Search to limit the list, then print it.</td>
</tr>
<tr>
<td>Copy record</td>
<td>Lets you create a new row by copying an existing one. This command saves time and retyping if you are adding many rows and the contents vary only slightly. Horizon disables this command when the edit window is open. To copy the contents of a field, use the commands on the Edit menu. The Copy command does not work if you have more than one row selected.</td>
</tr>
</tbody>
</table>
## File Menu

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete record</td>
<td>Deletes a row (or rows) from the list window or the row you are editing in the edit window.</td>
</tr>
<tr>
<td></td>
<td><em>WARNING</em></td>
</tr>
<tr>
<td></td>
<td>It is possible to have rows selected that are not showing on the window. Check the rows you have selected before using Delete record.</td>
</tr>
<tr>
<td></td>
<td>When you use the Delete record command, Horizon will always prompt you to verify the deletion with a message such as: “OK to delete selected record(s)?” If you do not want to delete the row, choose Cancel on the window prompt.</td>
</tr>
<tr>
<td></td>
<td>The Delete record command is immediate and permanent; you cannot undelete something if you make a mistake. For this reason, you should never automatically press ENTER at the verification message.</td>
</tr>
<tr>
<td></td>
<td>Also, because Horizon is based on a relational database, there might be several other tables that depend on the row you delete. Accidentally deleting a key row can cause serious problems with your database. If you have any doubts about deleting a row, call Horizon Customer Support.</td>
</tr>
<tr>
<td>Export Record(s)</td>
<td>Lets you export the contents of a list window to a file. This is a convenient way to create reports or send information via e-mail.</td>
</tr>
<tr>
<td>Open View</td>
<td>Displays the Code Lookup Horizon View window from which you open another view. Once you are in the Table Editor, you can use this command at any time.</td>
</tr>
<tr>
<td>Close View</td>
<td>Closes windows you are no longer using. Close View closes only the view that has “focus”—that is, the view you have worked with most recently. Horizon prompts you to save any changes before closing the window.</td>
</tr>
<tr>
<td>Search</td>
<td>Opens the List Search window. Press CTRL+F2 to choose this command. (For more information, see “Using the List Search Window” on page 1-16.)</td>
</tr>
<tr>
<td>Where clause</td>
<td>Opens the Selection Criteria window in which you can restrict a list to those rows that match certain criteria. Press SHIFT+F2 to choose this command. (For information about using the where clause, see “Using a Where Clause to Search for Rows” on page 1-23.)</td>
</tr>
<tr>
<td>Compound Search</td>
<td>Opens the Compound Search window in which you can choose multiple indexes to search on for the displayed list window. Press ALT+F2 to choose this command. (For more information, see “Doing a Compound Search” on page 1-19.)</td>
</tr>
<tr>
<td>New</td>
<td>Opens a blank edit window to create a new row in a table. This command is the same as the New button in a list window.</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens an edit window for an existing row which you can then modify or view. You can edit the same field for several selected rows, referred to as batch editing. This command is the same as the Edit button in a list window.</td>
</tr>
</tbody>
</table>
Chapter 1: Getting Started

File Menu

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change User</td>
<td>Opens the Change User window from which you can change the current user for a login session. Typically, you should either change users or log off to safeguard the workstation from unauthorized use when you are finished with your work in Horizon. 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.</td>
</tr>
<tr>
<td>Change Default Owner</td>
<td>Opens the Change Default Owner window from which you can change the default owner you want to assign to any records you create during this login session.</td>
</tr>
<tr>
<td>Change Location</td>
<td>Opens the Change Location window from which you can change the default location for this login session.</td>
</tr>
<tr>
<td>Exit</td>
<td>Closes all Horizon processes.</td>
</tr>
</tbody>
</table>

Edit Menu

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut, Copy, Paste</td>
<td>Work as they do in other common user access applications.</td>
</tr>
<tr>
<td>Clear Field</td>
<td>Clears the contents of the selected field.</td>
</tr>
<tr>
<td>Code Lookup</td>
<td>Opens a list of codes valid for the field where the insertion cursor appears. Choosing this command is the same as choosing the Codes button for the field the cursor is in. You can also press F12 to open a codes list. To use the Code Lookup command in the Edit menu, the cursor must be in a coded field. When you use a Codes button, the cursor can be anywhere on the window. Horizon automatically positions the cursor in the field next to the Codes button selected.</td>
</tr>
<tr>
<td>New Subrecord</td>
<td>Displays a new group entry in a group. Selecting New Subrecord is the equivalent of choosing New in a group. (For a description of groups, see the “Horizon User Interface” chapter of the Horizon Basics Guide.)</td>
</tr>
<tr>
<td>Delete Subrecord</td>
<td>Deletes the displayed group entry. However, the database is not updated until you save the editing changes. Choosing this command is the same as choosing Delete in a group. If you accidentally delete the wrong group entry, you can close the main record without saving it, reopen the record, and the “deleted” group entry will be restored. However, closing without saving will cause you to lose any other changes you have made.</td>
</tr>
</tbody>
</table>
### Window Menu

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cascade</td>
<td>Puts the windows back in order with the windows cascading down and to the right so that all the title bars are visible. As you work with the windows, you might decide to move them to new locations on the window. Having several windows open at one time can be confusing.</td>
</tr>
<tr>
<td>[Window Title]</td>
<td>Window Titles is a section of the Windows menu. Window Titles lists each open window. Choose the one you want to open. You can use this list to verify what is open if you cannot see every window’s title bar.</td>
</tr>
</tbody>
</table>

### Help Menu

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Launch Help Center</td>
<td>Opens the Help Center. The Help Center contains PDF versions of any Horizon user’s guide that you have installed on your workstation. It also lists additional SirsiDynix resources.</td>
</tr>
<tr>
<td>About Horizon</td>
<td>Displays a window that lists the software version, build number, and database version of Horizon currently running on the workstation.</td>
</tr>
</tbody>
</table>
General Setup

This chapter explains the defaults you must set up for your Horizon system to work. You may need to set defaults in this chapter only once; other defaults you may need to modify periodically.

- About Setup 2-3
- System-Wide Settings 2-4
- Library Locations 2-19
- Collections 2-48
- Collection Item Statistical Classes (ISTATs) 2-56
- Call Number Types 2-58
- Call Number Item Statistical Classes (Call ISTATs) 2-62
- Borrower Statistical Classes (BSTATs) 2-64
- Labels 2-65
- MARC Maps 2-93
- Right-to-Left Language Display 2-112
- Displaying the Horizon Launcher from Right to Left 2-115
- Euro Converter 2-115
About Setup

Before you use Horizon, you need to set up the system to accommodate all the different functions of your library.

NOTE

You should understand how to use the Table Editor before you do any of the tasks in this chapter. (For information about how to use the Table Editor, see “Horizon Table Editor” on page 1-12.)

This chapter is divided into sections. Each section corresponds to a different parameter or group of parameters you must set up on your system, such as library locations or collections. Each section explains the view or views you enter data into to set particular parameters. To set up all of your system defaults, open each table as directed from the Table Editor and enter the required information.

IMPORTANT

All the setup explained in this chapter must be completed before you can use the Horizon system or proceed to subsequent chapters. The data you enter in this chapter’s tasks will be used in subsequent chapters.

This chapter explains these topics:

- **System-Wide Settings.** The system parameters you set up determine how you will accomplish the daily tasks you do in your different library departments—such as Day End and cataloging. (See page 2-4.)
- **Library Locations.** Your library might have one or more locations. This section explains how to set up the location addresses, circulation privileges, and operating hours of each location. (See page 2-19.)
- **Collections.** Collections let you group related items. This section explains how to define the collections you have in your library. (See page 2-48.)
- **Collection Item Statistical Classes (ISTATs).** Item statistical classes (ISTATs) let you generate statistics for your collections. This section explains how to assign item statistical classes to collections. (See page 2-56.)
- **Call Number Types.** Call number types let you generate detailed statistics about a collection according to its call number type and range. This section explains how to define the call number types you have in your library. (See page 2-58.)
- **Call Number Item Statistical Classes (Call ISTATs).** This section explains how to update the call number item statistical classes (ISTATs) that are assigned to groups of call numbers. (See page 2-62.)
- **Borrower Statistical Classes (BSTATs).** This section explains how to assign statistical classes to groups of borrowers who use the library. (See page 2-64.)
- **Labels.** Some Horizon processes let you print borrower mailing labels, spine labels, card labels, and so forth. This section explains how to set up these labels. (See page 2-65.)
Chapter 2: General Setup

- **MARC Maps.** A MARC map is a set of tags and subfields that display on your bibliographic and authority records. This section explains how to set up or edit your MARC Maps. (See page 2-93.)

- **Right-to-Left Language Display.** You set up Horizon so that you can correctly view and edit records whose information is in a language that reads from right to left (for example, Arabic or Hebrew). (See page 2-112.)

- **Euro Converter.** The Euro converter lets libraries do financial transactions in either their national currency or in the European currency called the “Euro.” This section explains how to set up your system to work with the Euro. (See page 2-115.)

**NOTE**

The tasks in this guide apply to general system setup. (For information on setting up and administering specific Horizon products, see the guide for that product.)

**System-Wide Settings**

System parameters consist of settings that affect all the tasks you do in your system each day. You set up all your system defaults in the matham (System-wide Parameters) view. Some of the fields in the matham view contain default information from when you installed Horizon—other fields are empty. When you set up your system-wide settings, you need to complete the empty fields, then review the default information to ensure that the settings accomplish what you want Horizon to do for each task.

**Before You Begin**

To set up system-wide settings, you must understand cataloging functions and MARC records. In addition, many system-wide settings require you to understand fundamental parts of your entire Horizon system. You may want to read this entire section to get an idea of the type of information you need before you set up this view. Several settings give you references to other documentation that will help you as you set up this view.
To set up system-wide settings

**View:** matham

**Process:** Administration\System Setup\Matham - System Wide Parameters

### Days in New Titles

Enter the number of days a new title should remain in the Staff PAC list of new titles before Day End clears it.

Day End is a program that runs each day to update records on your system.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days in New Titles</td>
<td>Enter the number of days a new title should remain in the Staff PAC list of new titles before Day End clears it. Day End is a program that runs each day to update records on your system.</td>
</tr>
<tr>
<td>Subject Scheme</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark this box if you want to let users search by specific types of subject headings, such as Library of Congress subject headings or Medical subject headings. If you mark this box, Horizon recognizes the subject heading codes in tag 008, position 11 of your authority records and lets you create separate indexes for each subject heading system.</td>
</tr>
<tr>
<td></td>
<td>• Clear this box if you need only one subject list index and one subject keyword index that include all subject headings, regardless of subject heading system. If you clear this box, Horizon merges matching subject headings, even if the heading system codes are different. Clearing this box also means that you cannot create or maintain separate indexes based on subject heading system.</td>
</tr>
</tbody>
</table>
### Chapter 2: General Setup

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| System MARC Type              | This field determines the MARC standard that Horizon uses to interpret the bib records in your database. SirsiDynix staff sets this field during Implementation based on whether you use MARC or UNIMARC records. You should not need to change it.  
This is what each option indicates:  
- **USMARC-like Database.** This option is for databases containing bib records that use the USMARC standard or something similar, including the UKMARC and MARC 21 standards.  
- **UNIMARC-like Database.** This option is for databases containing bib records that use the UNIMARC standard or something similar. |

<table>
<thead>
<tr>
<th>Move 001 to 035 on Import</th>
<th>Do one of these options:</th>
</tr>
</thead>
</table>
|                               | - Mark this box if you want to move the control number in tag 001 (Control Number) to tag 035 (System Control Number) when you import bib or authority records. 
  Bib and authority records you receive from other sources generally include a control number in tag 001. This control number is assigned by the organization from whom you are receiving the record. Marking this box lets you move the original control number so you can use tag 001 for your own control number, without losing the original control number.  
- Clear this box if you do not want to move the control number in tag 001 when you import bib or authority records. |

### NOTE

Most libraries choose not to move the control number in tag 001.

<table>
<thead>
<tr>
<th>Update Bib Date on Auth Update</th>
<th>Do one of these options:</th>
</tr>
</thead>
</table>
|                               | - Mark this box if you want the update date field on a bibliographic record to change automatically when an attached authority record is changed. This is the default setting.  
- Clear this box if you do not want the update date field on a bibliographic record to change automatically when an attached authority record is changed. |
**System-Wide Settings**

**Day End Start Time** Enter the time (in hours and minutes) before midnight that Day End runs each day. Day End Processing updates records on your system and helps you operate more efficiently by letting you track overdue books, prepare overdue notices, change the status of some items, prepare monthly and daily statistics, and so on. You should coordinate this time so that it does not interfere with backing up the database. The Day End program must be left active while running.

**NOTE**

In addition to completing this field, you must set up parameters that determine which processes run with your Day End schedule, and how often they run. (For instructions, “Configuring Day End Parameters” on page 6-12. For general information on the Day End program, see “Day End” on page 6-9.)

**Last Day End Date** This field displays the last date Day End was run for a location. This field will be empty if your Horizon system is new and you have not run Day End yet.

**Decimal Digits** Enter a number between 1 and 4. This is the number of digits to the right of the decimal you want for monetary amounts in the database. The default setting is 2.

---

**Edit: System wide Parameters**

- **See Also's in FAC**: UA appears under current heading
- **Support URL**: http://clientcare.sirsidynix.com/
- **Circ Settings by**: Item's Location, Circ Location
- **Notify Borrower of Request Delete**: ✔
- **System Subfield Control**: None, Just Bib, Bib and Auth
- **Auth Matching Ignores Punctuation**: ✔
- **NACO Normalize Auth Matching**: ✔

---

Page 2 of 6
In this field | Do this
---|---
See Also’s in PAC | Mark one of these options to determine how your See Also references will appear in staff searching and PAC:
  - **SA appears under current heading (Historic).** Mark this option if you want See Also references to appear under the current heading in PAC.
  - **Current heading appears under SA (USMARC).** Mark this option if you want the current heading to appear under the See Also references in PAC.
Support Url | This field contains the URL for the SirsiDynix Customer Support Web site.
Circ Settings by Item’s Location | Choose one of these options:
  - **Item’s Location.** Mark this option if you want circulation privileges to be determined by the item’s owning location.
  - **Circ Location.** Mark this option if you want circulation privileges to be determined by the item’s circulating location.
(For more information, see “Setting Up Circulation Privileges Tracking” on page 2-17.)
Circ Settings by Circ Location | Do one of these options:
  - Mark this box if you want Horizon to notify borrowers when requests are deleted from Circulation or staff searching.
    Horizon lets borrowers request items that are checked out (or available only at another location) so that when they are returned, the requesting borrower has the first option to check out the item.
    If you mark this box, Horizon displays a notification block for the borrower who requested the item.
  - Clear this box if you do not want Horizon to notify borrowers when requests are deleted from Circulation or staff searching.
    If you clear this box, Horizon will not display notification blocks.
(For more information on requests, see the “Hold Requests” chapter in the Circulation Guide.)
### System Subfield Control

This field is used with cataloging features that provide authority control by subfield and that ensure the preservation of local authority-controlled subfields when your library imports records. Read the Support documentation related to these features before changing this field. (For more information, see “Subfield Setup Tasks” on page 2-18.)

*WARNING*

Do not change this field except as instructed in the Support documentation or by SirsiDynix Customer Support staff. The features related to this setting may have already been set up at installation or during an upgrade. If so, you should not need to change this field.

### Auth Matching Ignores Punctuation

Do one of these options:

- Mark this box if you want Horizon to ignore end punctuation when linking a bib record to an authority record.

  Marking this box prevents Horizon from creating a new authority record if the only difference between the data in the bib record and the data in an existing authority record is end punctuation.

*IMPORTANT*

After you change this field, you must run two programs (AuthPunc and BAReLink) to update your existing bib and authority records to reflect the new setting. Read the Support documentation related to this field before changing this field. (For more information, see “Subfield Setup Tasks” on page 2-18.)

- Clear this box if you want the system to include punctuation in the matching criteria.

### NACO Normalize Auth Matching

You can set up normalization rules for MARC authority data in Horizon. Normalization makes text more uniform so that MARC authority data matching is more accurate. In addition, normalization lets you set rules that determine whether Horizon adds each incoming authority record to the database, overlays an existing record, merges with an existing record, or deletes a record.

Do one of these options:

- Mark this box to set normalization rules for MARC authority data in Horizon.

- Clear this box if you want to use Horizon’s normalization procedure in matching MARC authority data.

(For more information, see “Using Normalization Rules” in the “Using the Authority Loader” section of the Cataloging Setup Guide.)
<table>
<thead>
<tr>
<th>Auth Punctuation</th>
<th>From Auth</th>
<th>From Original Marc Rec</th>
<th>USMarc Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preserve Auth See/See Also</td>
<td>Yes</td>
<td>No</td>
<td>1</td>
</tr>
<tr>
<td>Auto Complete Code Fields</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Primary Language</td>
<td>en</td>
<td>fr</td>
<td></td>
</tr>
<tr>
<td>^Horizon Application Server URL</td>
<td>automation-111088</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renewal Allowed for Requested Items</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Last New Item Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pull List Priority</td>
<td>None</td>
<td>Location Priority</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Circ 28 Priority</td>
<td>Request Queue Order</td>
<td></td>
</tr>
</tbody>
</table>

[Image: Edit: System wide Parameters]

Page 3 of 5
### In this field | Do this
---|---
Auth Punctuation | You have three ways to preserve end punctuation in authority-controlled subfields in a MARC record. First, you can choose to draw all punctuation from the authority heading in the associated authority record. Second, you can choose to preserve all original punctuation in the bib or authority record as it was added at creation time or when you added a new authority controlled tag to the bib or authority. Third, you can choose that Horizon determines all punctuation based on USMARC punctuation rules. Horizon draws all punctuation shown in authority-controlled tags in a bib or authority record directly from the authority heading in the associated authority record. There are two exceptions that require different rules:

- **Bib series headings.** If the \( v \) (volume/sequential designation) subfield is not set as controlled on the bib tag, then the subfield preceding the \( v \) subfield should have a space and a semi-colon (;) as the trailing punctuation.

- **Bib name headings.** If the \( d \) (dates associated with name) subfield is immediately followed by a local subfield \( e \) (relator term) or \( u \) (affiliation), then the \( d \) subfield should end with a hyphen and a space (-) if only one date is present. If both dates are present, then the \( d \) subfield should end with a comma (,).

Some tags in bib records are both series and name headings. For these tags, both exceptions to the USMARC rules apply.

Mark one of these options for handling end punctuation in linking tags in bib records:

- **From Auth.** Mark this option if you do not want to preserve the original end punctuation in linking tags in imported bib records. If you mark this option, Horizon replaces the end punctuation in linking tags in the bib record with the end punctuation in the authority record.

- **From Original Marc Rec.** Mark this option to preserve the original end punctuation in linking tags in imported bib records.

- **USMarc Format.** Mark this option to migrate ending punctuation into the link-from MARC record from the authority record’s subfields, except for the cases where the punctuation is dependent on the subfields in the link-from tag.

Marking the USMarc Format option has implications for how Horizon handles See Also and See Also From references in authority records. If you choose this option, Horizon draws punctuation for See Also and See Also From references from the authority heading in the referenced authority record.

---

**IMPORTANT**
### Chapter 2: General Setup

#### Preserve Auth See/See Also

This setting affects all import sources.

- Mark this box if you do not want Horizon to change *See* and *See Also* tags in incoming or existing authority records when your library imports MARC records, even if the headings in those authority records are in conflict.
  
  (For more information, see “Setting Up General Import Source Parameters for Bib and Authority Records” in the *Cataloging Setup Guide*.)

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preserve Auth See/See Also</strong></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>- Mark this box if you do not want Horizon to change <em>See</em> and <em>See Also</em> tags in incoming or existing authority records when your library imports MARC records, even if the headings in those authority records are in conflict.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Setting Up General Import Source Parameters for Bib and Authority Records” in the <em>Cataloging Setup Guide</em>.)</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>This setting affects all import sources.</td>
</tr>
<tr>
<td></td>
<td>- Clear this box if you do not want the system to preserve <em>See</em> and <em>See Also</em> headings in authority records during overlay.</td>
</tr>
</tbody>
</table>

#### Auto Complete Code Fields

Do one of these options:

- Mark this box to have Horizon automatically complete coded fields when you type in the first or the first few letters of a code.
  
  You click the Codes button next to a field to view a complete list of the codes that Horizon can automatically enter in that field. Not all coded fields can be completed automatically.

- Clear this box if you do not want Horizon to automatically complete coded fields.

#### Horizon Application Server URL

If you upgraded from a previous version of Horizon, you should have entered this value during the upgrade. If you did not do so, you need to specify this value now.

By default, the value of this field is “localhost:1099”. This value is the machine name, plus a colon, plus the JNDI port number that Horizon uses to connect to the Java naming service being hosted by the Horizon Application Server. (Horizon needs the naming service so it can provide request functionality.) When the application server starts, it runs this service on the specified port on the machine it is running on.

**Do these steps:**

1. Replace the “localhost” value with the name of the machine where the Horizon Application Server is running.
2. Change the port number value *only if* another service running on the Horizon Application Server machine is using the 1099 port.

**IMPORTANT**

This URL must be correct or you cannot place requests in Horizon. If you ever change the machine where your Horizon Application Server is installed, you need to change this URL.
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renewal Allowed for Requested Items</td>
<td>If you want to let borrowers use Horizon Information Portal to renew items that have hold requests on them, mark this box. Marking this box lets users renew items in My Account.</td>
</tr>
<tr>
<td>Pull List Priority</td>
<td>This field lets you minimize the number of transit holds by matching local borrower requests to local items before sending an item to another location. Mark one of these options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>None</strong>. Mark this option if you want to fill requests using no filtering. The system will not take transit or other values into consideration.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Location Priority</strong>. Mark this option if you want to fill requests at your location first, only afterwards allowing transit of items to other locations. (For more information, see “Minimizing Transit Holds” in the “Setting Up Hold Requests” section of the <em>Circulation Setup Guide</em>.)</td>
</tr>
<tr>
<td></td>
<td>- <strong>Circ 29 Priority</strong>. Mark this option if you want to fill requests according to circ 29 ranking, minimizing transits only as a secondary consideration.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Request Queue Order</strong>. Mark this option if you want to fill requests in the order they appear on the queue, minimizing transits only as a secondary consideration.</td>
</tr>
</tbody>
</table>
Chapter 2: General Setup

In this field Do this

Horizon App Server Version
Select the version of Horizon Information Portal (HIP) that you are using.

Choose one of these options:
- **No Horizon Application Server Connection**. Select this option if you are not using HIP or if you do not want to connect to a HIP server.
- **Horizon App Server Version 3.x**. Select this option if you are using a 3.x version of HIP.
- **Horizon App Server Version 4.x**. Select this option if you are using a 4.x version of HIP.

**NOTE**
Horizon 7.5 only works with HIP 3.20 or no HIP connection.

Horizon App Server Data Source
 Horizon Information Portal 4.0 lets you connect to multiple databases on multiple servers. However, the Horizon client is still connected to one Horizon database. In order for the Horizon client to know what database to access when a request is made from Horizon to the Application Server, you must specify the data source name used by Information Portal. This tells the Horizon client which database to access.
Enter the Application Server DSN.

Non-Filing Indicator
Select this option to apply the indicator to the first subfield in the tag, or to apply it to subfield A, regardless of where subfield A appears in tag order.
If you want to track and create reports on how long it takes your library to fill a request, you can choose to keep a history of requests. You specify how long you want Horizon to keep track of requests.

For more information, see Setting Up the History of Requests in the *Circulation Setup Guide*.

This setting controls whether Authority record changes are added to the word_index_pending table. Doing so allows HIP to reindex the authority.

This setting only applies to sites using Horizon Information Portal (HIP) 4.x.
In this field Do this

HIP/Phone Messaging Expired Borrower Renewal

- **Not allow renewal**
- **Truncate due date**
- **Use full loan period**

Enterprise Details

- **No Deltas produced**
- **Deltas for Bib records only**
- **Deltas for both Bib and Auth records**

In this field

<table>
<thead>
<tr>
<th>HIP/Phone Messaging Expired Borrower Renewal</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image-url" alt="Image of parameter settings" /></td>
</tr>
</tbody>
</table>

If a borrower’s library card expires during a loan period, you can choose whether to have the loan period truncated or allow the user to complete a full loan period. Or, you can choose whether you want to allow a borrower to renew an item when they have an expired library card. This feature affects renewals via Information Portal and Phone Messaging, and checkouts and renewals via Self-Serve Checkout stations.

Choose one of these options.

- Choose **Not allow renewal** if you do not want to allow renewals for borrowers with expired library cards.
- Choose **Truncate due date** if you want to truncate the due date of an item so that the item is due when the library card expires.
- Choose **Use full loan period** if you want to allow the full loan period for a borrower with a library card that will expire.
If you want to, you can have the settings for loan period, renewals, and fine rate controlled by the circulating location instead of the item’s owning location.

If you want to use the Circulation Privileges Tracking feature, Horizon will track the original circulating location for items instead of tracking the owning location. The privileges of the original circulating location apply to the items through the entire circulation cycle of that item.

(For background information on many of these circulation settings, see the Circulation Setup Guide.)

This table shows the location parameters for two locations:

<table>
<thead>
<tr>
<th>Location</th>
<th>Loan Period</th>
<th>Renewal Period</th>
<th>Fine Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circulating</td>
<td>3 weeks</td>
<td>2 weeks</td>
<td>50 cents per day</td>
</tr>
<tr>
<td>Location A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owning Location B</td>
<td>2 weeks</td>
<td>1 week</td>
<td>25 cents per day</td>
</tr>
</tbody>
</table>

At Location A, a borrower might check out an item owned by Location B, and get the item for three weeks. If that borrower renews the item at Location B, he or she gets the item for two more weeks because Horizon applies the privileges of the original circulating location which is Location A. If the borrower keeps the item until it is overdue and then returns it to Location B, the fine is calculated according to the settings of Location A.

To set up Circulation privileges tracking

1. Open the matham view in the Table Editor, or start the Matham-System Wide Parameters process.

   The default location of this process is the Administration\System Setup folder on the navigation bar.
Chapter 2: General Setup

Horizon displays the List System-wide Parameters window.

2 Choose the only row in the List window.
   Horizon displays the Edit System-wide Parameters window.

3 Click Page Down or resize the window to display the Circ Settings by field:

   ![Edit System-wide Parameters Window]

4 Choose one of these options in the Circ Settings by field:
   - **Item's Location.** Mark this option if you want circulation privileges to be determined by the item’s owning location.
   - **Circ'ing Location.** Mark this option if you want circulation privileges to be determined by the item’s circulating location.

5 Save your changes.

Subfield Setup Tasks

Horizon has several Cataloging features that you can activate to enhance cataloging workflow. These features affect how bib records retain and display information. This section summarizes the features you can activate. (For instructions on activating these features, see the Support documentation on the SirsiDynix web site.)

**NOTE**

If you upgraded to Horizon from a previous release (6.0 or later), you may have chosen to complete these tasks as part of the upgrade process. If you are a new Horizon customer, you may have chosen to have SirsiDynix complete these tasks for you as part of the Horizon implementation process. If you have already activated these features, you do not need to activate them again.

You can implement any of these features:

- **Authority control by subfield.** This feature lets you define authority control by subfield, so that only subfields that are defined as controlled have to match the corresponding subfield in the authority record. This lets you have different sets of controlled subfields.
within separate bib tags, even if those tags are controlled by the same authority record. (For example, if you activate this feature, you can set subfield v to be controlled in the 400 tag but not in the 600 tag, even when both bib tags are controlled by the same authority tag.) This feature is implemented with either the “Just Bib” or “Bib and Auth” option in the System Subfield Control field on the matham table.

- **Preservation of local authority-controlled subfields.** This feature preserves information your library has added to local authority-controlled subfields when you upgrade or overlay bib records. You will most likely use this feature if you want to preserve subfield w on 4xx and 5xx tags. To implement this feature, you must also implement authority control by subfield (explained above). This feature is implemented with the “Bib and Auth” option in the System Subfield Control field on the matham table.

- **Authority matching ignores punctuation.** This feature prevents Horizon from creating a new authority record if the only difference between the data in the bib record and the data in an existing authority record is end punctuation. This feature is implemented with the Auth Matching Ignores Punctuation field in the matham table.

- **Preserve original end punctuation.** This feature keeps the original end punctuation in the bib record, instead of having Horizon replace it with the end punctuation in the authority record when the end punctuation in the two records is different. This feature is implemented with the Preserve Auth Punct. in Marc Recs field in the matham table.

**IMPORTANT**

Do not change the fields on the matham table that are related to these features without first reviewing the Support documentation on the SirsiDynix web site.

**Library Locations**

A location record contains information such as the location’s name, address, and fiscal year dates. Some libraries may have only one location and hence one location record; other libraries may have several branches, each with a corresponding location record. Or, a library may have several “locations” within the same building. (For example, the science library on the 4th floor may be a different location than the reference library on the 1st floor—although they are in the same building.)

When you create a location, an ITYPE, or a BTYPE, Horizon creates location, ITYPE, and BTYPE groups that contain only one code. You can also set up groups that contain as many codes as you want. These groups help you create exceptions to each default circulation privilege and special values for circulation parameters because they let you combine BTYPES and ITYPES that can use the same privileges. (For more information, see “Creating or Editing Groups to Define Circulation Privileges and Parameters” in the *Circulation Setup Guide*.)

This chapter explains the main parameters you need to set up for locations at your library. It also explains specific parameters such as library hours, that you need to set up for a location.

This section explains these topics:

- Setting Up a Location Record
- Specifying Library Hours
- Specifying Holiday Hours
- Specifying Library Addresses
- Specifying Primary and Secondary Locations for Staff Searching
Chapter 2: General Setup

- Setting Up Parameters for a Reserve Location
- Specifying Serials Checkin Locations
- Setting Up Home Service Parameters
- Displaying Blocks from Another Location
Setting Up a Location Record

You set up a location record in the location view in the Table Editor. You create additional location records by copying the first record then editing the necessary information.

The location record includes many circulation settings. You need to have an understanding of your library’s circulation policies and statuses to complete it. In addition, several pages of the location record contain fields used by particular features or processes. (For example, the SCKI Location field determines which location checks in another location’s serial issues. You would complete this field only if you use Horizon Serials.) Complete these fields as instructed if the location requires them; otherwise, leave them empty.

Understanding Barcode Formats

When you set up a location record, you set up the format for your borrower and item barcodes for that location. Item and borrower barcodes usually contain a prefix, leading zeros, and significant digits. Before you begin, you need to decide what format you want. You need to specify a prefix which consists of one number indicating barcode type and four numbers indicating a library’s institution code. You also specify how many characters are in the barcodes. The significant digits come at the end of the barcode and make each barcode unique. As a result, the number of significant digits varies. Using the format and length information, Horizon creates a barcode by adding the prefix to the front, adding the significant digits to the end, and then “padding” the significant digits with leading zeros to fill the barcode length you specify. Because Horizon creates barcodes in this way, your staff need to enter only the significant digits of an item or borrower barcode to identify it.

For example, this sample barcode has a length of 14 digits:

```
2 1234   00000  453
```

In this example, the “2” at the beginning identifies this as a borrower barcode; the next four digits identify the institution.

**NOTE**

You can use alpha characters in the borrower or item barcode prefixes. However, the current release does not support alpha characters in an item barcode prefix when you batch create items.
To set up a location record

View: location  
Process: Administration\System Setup\Location Parameters

**In this field** | **Do this**
---|---
Location Code | Enter a code that identifies the location. This code can contain up to seven characters. Do not use the percent ( % ) or underscore ( _ ) SQL wildcard characters as characters in the code, or in any code field you create in Horizon.

Name | Enter the full name of the location. Enter the location name exactly as you want it to appear on printed items, such as notices and purchase orders.

Always Renew from Now | Do one of these options:
- Mark this box if the circulation renewal loan period for this location is based on the current date regardless of the original due date and time.
- Clear this box if the circulation renewal loan period is based on the current date only if the item being renewed is overdue; otherwise, the item will be renewed based on the original due date and time.

(For more information, see “Setting Renewal Rules” in the Circulation Setup Guide.)
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow PAC Hold Requests</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark this box if you want to let borrowers make hold requests in PAC.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>If you allow requests at your library, you must set up request parameters in several different views in Horizon. You also need to do additional setup for this feature to work in Horizon Information Portal.</td>
</tr>
<tr>
<td></td>
<td>• Clear this box if you do not want borrowers to be able to make hold requests in PAC.</td>
</tr>
<tr>
<td>Last Hold Exp. Date</td>
<td>This field is no longer used.</td>
</tr>
<tr>
<td>Default Hold Notice Type</td>
<td>If you allow hold requests, mark one of these options to determine how you will notify borrowers of holds:</td>
</tr>
<tr>
<td></td>
<td>• mail</td>
</tr>
<tr>
<td></td>
<td>• phone</td>
</tr>
<tr>
<td></td>
<td>• deliver</td>
</tr>
<tr>
<td></td>
<td>When requested items become available and are on hold, Horizon will notify borrowers using this method.</td>
</tr>
<tr>
<td>Borrower Barcode Prefix</td>
<td>Enter the prefix that you will use for borrower barcodes.</td>
</tr>
<tr>
<td></td>
<td>Barcodes may have a set pattern where the leading digits indicate whether a barcode is for an item or a borrower. The prefix should include the institution code of your library. You can use either alpha or numeric characters.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>For an example of how the barcode will look after you enter the barcode prefix and length, see the barcode example on page 2-21.</td>
</tr>
<tr>
<td>Borrower Barcode Length</td>
<td>Enter the number of characters in borrower barcodes.</td>
</tr>
<tr>
<td>Item Barcode Prefix</td>
<td>Enter the prefix that you will use for item barcodes.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>The item barcode prefix serves the same identification purpose as the borrower barcode prefix. However, the number you use to identify an item barcode should be different from the number you use to identify a borrower barcode.</td>
</tr>
<tr>
<td>Item Barcode Length</td>
<td>Enter the number of characters in item barcodes.</td>
</tr>
<tr>
<td>PAC Timeout (seconds)</td>
<td>This field is no longer used.</td>
</tr>
</tbody>
</table>
### Chapter 2: General Setup

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circ Timeout (seconds)</td>
<td>Enter the amount of time (in seconds) that must elapse while circulation staff is identifying items before Horizon prompts your staff to verify that they are still working with the same borrower. You should make sure the timeout is long enough that staff are not interrupted while checking out several items to the same borrower. However, do not make the timeout so long that staff accidentally checks out items to the wrong borrower. SirsiDynix recommends using between 40 and 60 seconds.</td>
</tr>
<tr>
<td>Calendar Reminder Date</td>
<td>Enter the date when Horizon prompts staff to update the location’s calendar and operation hours for the upcoming year.</td>
</tr>
<tr>
<td>Charge for Closed Days</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark this box if you want to charge overdue fines for days on which the library is closed and if you want closed days to count as part of the grace period. (This setting also applies to closed hours, if defined.)</td>
</tr>
<tr>
<td></td>
<td>• Clear this box if you do not want to charge overdue fines for days on which the library is closed.</td>
</tr>
<tr>
<td>Lost to Missing (days)</td>
<td>Enter the number of days that must elapse before Day End changes an item’s status from “Lost” to “Missing.”</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> The change is necessary to keep the database current. This change in status breaks the link between the item and the borrower who lost it.</td>
</tr>
<tr>
<td>Claimed Ret. to Missing (days)</td>
<td>Enter the number of days that must elapse before Day End changes an item’s status from “Claimed Return” to “Missing.”</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> This change is necessary so that the circulation history data connecting a borrower to that item may be deleted.</td>
</tr>
</tbody>
</table>
In this field | Do this
--- | ---
On Reshelving Cart (days) | Do one of these options:
- Enter the number of days that you want to elapse before Day End changes an item’s status from “Shelving Cart” to “Checked In.”
- Enter “0” if you do not want checked in items to use the “Shelving Cart” status.

When items are checked in, Horizon assigns a status of “Shelving Cart.” After the number of days specified in this field have elapsed, Horizon changes the item’s status to “Checked In.”

Default Recall Due (days) | This field is no longer used.
Print Return Address | Do one of these options:
- Mark this box to print the library’s address on all printed items, such as notices and reminders.
- Clear this box if you do not want to print the library’s address on all printed items.
**Address Corr. Req.**

Do one of these options:
- Mark this box to print the message “Address correction requested” on all printed items, such as notices and reminders.
- Clear this box if you do not want to print the message “Address correction requested” on printed items.

*NOTE*

If you do not print the message “Address Correction Requested” automatically on each notice (because of a contract with the United States Postal Service), you can add the appropriate text when you customize notices and invoices. (For instructions, see “Customizing Notices” in the “Defining Notices, Invoices, and Reminders” section of the *Circulation Setup Guide*.)

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amt. Owed Before Reminder</td>
<td>Enter the amount that a borrower must owe before a reminder is sent. Enter the amount in this format: “NN.NN”. (For example, enter “15.00”, “.00”, or “.75”. Enter 14.99 if you want to send a reminder when the amount owed reaches $15.00.) Reminders are follow-up notices to those created by the Billing Notice Amount.</td>
</tr>
<tr>
<td>#Overdue Before Reminder</td>
<td>Enter the number of items that a borrower must have overdue before Horizon generates a notice. This notice is in addition to the normal overdue notice, and is intended to alert borrowers of accumulating overdue items. The maximum number of reminders is 255.</td>
</tr>
<tr>
<td>Reminder Invoice Delay (days)</td>
<td>Enter the number of days that Horizon delays sending a reminder invoice after a regular invoice has been sent and remains unpaid.</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Billing Notice Amount    | Enter the amount that a borrower owes before a notice is generated.  
                             Enter the amount in this format: “NN.NN”. (For example, enter “15.00”, “.00”, or “.75”. Enter 14.99 if you want to send a reminder when the amount owed reaches $15.00.)  
                             Charges accrued include fines for overdue items, and charges for damaged and lost books. When a borrower’s fine amount equals the value in this field, Day End generates a notice. Any reminder notices depend on the value in the Amount Owed Before Reminder field on the location view. |
| Sort Notices By          | Enter the name of a database column from the borrower table that you want Horizon to sort notices by.  
                             Enter each column name separated by commas and with no spaces. The format is “column_name1,column_name2”. (For example, to sort borrower notices by location and then by borrower name, you would enter “location,name” with no space between the columns.) When notices are printed from Circulation Reports, they will be printed in the order specified in this field.  
                             **NOTE**  
                             For a list of columns in the borrower table, see the Table Structures Guide. |
| Borrower Mailing Label   | Enter or choose the code for the borrower mailing label that you want to use.  
                             Horizon comes with default labels. You can choose one of the default labels or create a new one. This label is used when you send a borrower a notice of items that were purchased through acquisitions, and for hold notices. Horizon comes with several default labels. You can choose one of the default labels, or create a new one.  
                             (For more information on labels, see “Labels” on page 2-65.) |
| Fiscal Year Starts       | This field is no longer used. |
### In this field

<table>
<thead>
<tr>
<th>Generate Billing Notices?</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark this box to generate billing notices for locations every day.</td>
</tr>
<tr>
<td></td>
<td>• Clear this box to prevent Horizon from automatically generating billing notices every day.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Borr. barcode on CKO window?</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark this box if you want the borrower barcode to display on the Checkout window in Circulation.</td>
</tr>
<tr>
<td></td>
<td>• Clear this box if you do not want the borrower barcode to display on the Checkout window in Circulation.</td>
</tr>
</tbody>
</table>

**NOTE**

By default, the borrower ID, not the barcode, displays on the Checkout window in Circulation. If you choose this option, the label in the Checkout window changes from “ID” to “Barcode” and the borrower barcode is displayed.
### In this field

<table>
<thead>
<tr>
<th>Allow Transit Holds Override</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>- Mark this box if you want to fill a hold request with the first available item that is checked in at a specific location even if another copy is in transit from another location to fill the same request.</td>
</tr>
<tr>
<td></td>
<td>- Clear this box if you do not want to fill a hold request with the first available item that is checked in.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Damaged-Cki Status</th>
<th>Enter or choose the code for the status that you want Horizon to assign to items that are checked in using the Damaged Checkin mode.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If you leave this field empty, Horizon will use the “Damaged” status. (For more information, see “Checking in a Damaged Item” in the “Checkout and Checkin” chapter of the Circulation Guide.)</td>
</tr>
</tbody>
</table>
### Damaged-Cki Show

**Borrower**

Do one of these options:
- Mark this box if you want Horizon to display the name of the borrower when items are checked in using the Damaged Checkin mode.
- Clear this box if you do not want Horizon to display the name of the borrower when items are checked in using the Damaged Checkin mode.

Displaying the borrower’s name lets circulation staff know who had the item checked out so they can enter a block on the borrower record for the damage, if necessary. However, if staff chooses to review damaged items and assess fines later, they can look up the previous borrower of an item in the Item Detail Status window. (For instructions, see “Viewing Detailed Information about an Item” in the “Item and Copy Records” chapter of the *Cataloging Guide*.)

### Charge for Grace Days

Do one of these options:
- Mark this box if you want to charge fines for grace days when an item is returned after the grace period ends.
- Clear this box if you do not want to charge fines for grace days when an item is returned after the grace period ends.

(For more information, see “Setting Up a Grace Period” in the “Setting Up or Editing Basic Circulation Policies” section of the *Circulation Setup Guide*.)

### Lost to Staff Only (days)

Do one of these options:
- Enter the number of days that you want items to keep the “Lost” status before these items no longer display in your PAC.
- Enter “1” (one) if you want lost items to become Staff Only the next time Day End processes run.
- Enter “0” (zero) if you never want lost items to go to Staff Only.

(For more information, see “Automatically Suppressing Items from Public Searches” in the “Preparing Horizon to Work with Item Records” section of the *Circulation Setup Guide*.)

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Damaged-Cki Show Borrower</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>- Mark this box if you want Horizon to display the name of the borrower when items are checked in using the Damaged Checkin mode.</td>
</tr>
<tr>
<td></td>
<td>- Clear this box if you do not want Horizon to display the name of the borrower when items are checked in using the Damaged Checkin mode.</td>
</tr>
<tr>
<td></td>
<td>Displaying the borrower’s name lets circulation staff know who had the item checked out so they can enter a block on the borrower record for the damage, if necessary. However, if staff chooses to review</td>
</tr>
<tr>
<td></td>
<td>damaged items and assess fines later, they can look up the previous borrower of an item in the Item Detail Status window. (For instructions, see “Viewing Detailed Information about an Item” in the “Item and</td>
</tr>
<tr>
<td></td>
<td>Copy Records” chapter of the <em>Cataloging Guide</em>.)</td>
</tr>
<tr>
<td>Charge for Grace Days</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>- Mark this box if you want to charge fines for grace days when an item is returned after the grace period ends.</td>
</tr>
<tr>
<td></td>
<td>- Clear this box if you do not want to charge fines for grace days when an item is returned after the grace period ends.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Setting Up a Grace Period” in the “Setting Up or Editing Basic Circulation Policies” section of the <em>Circulation Setup Guide</em>.)</td>
</tr>
<tr>
<td>Lost to Staff Only (days)</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>- Enter the number of days that you want items to keep the “Lost” status before these items no longer display in your PAC.</td>
</tr>
<tr>
<td></td>
<td>- Enter “1” (one) if you want lost items to become Staff Only the next time Day End processes run.</td>
</tr>
<tr>
<td></td>
<td>- Enter “0” (zero) if you never want lost items to go to Staff Only.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Automatically Suppressing Items from Public Searches” in the “Preparing Horizon to Work with Item Records” section of the <em>Circulation Setup Guide</em>.)</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Claimed Return to Staff Only (days)</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Enter the number of days that you want items to keep the “Claimed Return” status before these items no longer display in your PAC.</td>
</tr>
<tr>
<td></td>
<td>• Enter “1” (one) if you want Claimed Return items to become Staff Only the next time Day End processes run.</td>
</tr>
<tr>
<td></td>
<td>• Enter “0” (zero) if you never want Claimed Return items to go to Staff Only.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Automatically Suppressing Items from Public Searches” in the “Preparing Horizon to Work with Item Records” section of the <em>Circulation Setup Guide.</em> )</td>
</tr>
<tr>
<td>Missing to Staff Only (days)</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Enter the number of days that you want items to keep the “Missing” status before these items no longer display in your PAC.</td>
</tr>
<tr>
<td></td>
<td>• Enter “1” (one) if you want missing items to become Staff Only the next time Day End processes run.</td>
</tr>
<tr>
<td></td>
<td>• Enter “0” (zero) if you never want missing items to go to Staff Only.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Automatically Suppressing Items from Public Searches” in the “Preparing Horizon to Work with Item Records” section of the <em>Circulation Setup Guide.</em> )</td>
</tr>
</tbody>
</table>
## In this field

<table>
<thead>
<tr>
<th>Hold Shelf Expiry Includes Closed Days</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark this box if you want Horizon to include the library’s closed days as part of the time you keep a requested item on the holds shelf.</td>
</tr>
<tr>
<td></td>
<td>• Clear this box if you do not want Horizon to include the library’s closed days as part of the time you keep a requested item on the holds shelf.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Including Closed Days in the Hold Shelf Expiry Period” in the “Setting Up Hold Requests” section of the <em>Circulation Setup Guide</em>.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Master Location</th>
<th>Enter or choose the code for the location that will handle the circulation tasks for the location you are specifying.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>You may need to do this if you have defined multiple catalogs for collections that you store in the same physical location. (For example, you may have a reserve bookroom collection in the same building as your main collection, but use a separate Horizon circulation system for each collection.) You can set up Horizon so that one central workstation can handle circulation tasks for all collections in one physical location. This can help keep all circulation statistics in a single database. It can also help you avoid having to put items in transit to move them from one part of your library to another.</td>
</tr>
<tr>
<td></td>
<td>(For more information, see “Setting Up a Single Circulation Station for Multiple Locations” in the <em>Circulation Setup Guide</em>.)</td>
</tr>
</tbody>
</table>
**Specifying Library Hours**

Library hours are the times your library opens and closes. You can set up regular library hours, which stay the same from week to week. You can also make exceptions to your regular hours. (For example, if your library closes for holidays or stays open later during a final exam week, you can set up exception hours to those times.) You should keep your hours current so that due dates, fines, and statistics are accurate.

Defining hours includes setting up or editing two fields, each with a corresponding group:

- **Regular or daily hours**, including days the library is regularly closed.
- **Exceptions or holidays**, including days the library is open but for hours different than the regular hours. (For more information, see “Specifying Holiday Hours” on page 2-35.)

**NOTE**

You must enter an opening and a closing time for each day of the week. If your library is closed on specific days, you still need to mark the button for that day and display it in a group entry. Once the closed day is displayed, leave the Open and Close fields empty and save the setup.

---

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Registered BType</td>
<td>This feature will be available in a future release of Horizon Information Portal.</td>
</tr>
<tr>
<td>Self-Registered Borrower Stat Class</td>
<td>This feature will be available in a future release of Horizon Information Portal.</td>
</tr>
<tr>
<td>All items Out Display type</td>
<td>If you want to change which items display in a borrower’s record when a staff member clicks All Items Out, mark one of these options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>All Items Out</strong>. All the items that borrowers have checked out display.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Suppress ‘cr’ and ‘l’ items</strong>. Any items that borrowers have claimed returned or that your library has declared lost are not displayed.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Suppress ‘l’ items</strong>. Any items that borrowers have claimed are lost are not displayed.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Suppress ‘cr’ items</strong>. Any items that borrowers have claimed to have returned are not displayed.</td>
</tr>
</tbody>
</table>

(For more information, see “Changing Borrower Display Options for a Location” in the “Changing Circulation Display Options” section of the Circulation Setup Guide.)
To specify library hours

View: location
Process: Administration\System Setup\Location Parameters

<table>
<thead>
<tr>
<th>In this field in the Daily Hours group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td>Mark the day of the week for which you want to set up the hours.</td>
</tr>
<tr>
<td>Open</td>
<td>Enter the time that the library opens on the day you chose then mark the AM or PM button. Enter the time in this format: “NN:NN”.</td>
</tr>
<tr>
<td>Close</td>
<td>Enter the time that the library closes on the day you chose, then mark the AM or PM button. Enter the time in this format: “NN:NN”.</td>
</tr>
<tr>
<td>First Booking</td>
<td>If your library uses Advanced Booking, enter the first booking time and the last advance booking checkout time. The First Booking Time is the time after the location opens before which bookings will not be allowed. This gives overnight checkouts time to be checked in before the next conflicting booking. The Last Advanced Booking Time is the time just before closing when Horizon does not allow checkout of hourly materials.</td>
</tr>
<tr>
<td>Last Adv Booking CKO</td>
<td>If your library uses Advanced Booking, enter the last advance booking checkout time. If your library is closed that day, leave this field empty.</td>
</tr>
</tbody>
</table>
Specifying Holiday Hours

Horizon lets you set up exceptions to your regular library hours. (For example, you may have different hours or be closed on holidays.)

To specify holiday hours

View: location

Process: Administration\System Setup\Location Parameters

<table>
<thead>
<tr>
<th>In this field in the Holidays group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Enter the date of the holiday. Enter the date in this format: “MM/DD/YYYY”. (For example, enter “12/15/2000”.)</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the holiday.</td>
</tr>
<tr>
<td>Open</td>
<td>Enter the time that your library opens and mark the AM or PM button. If your library is closed that day, leave this field empty.</td>
</tr>
<tr>
<td>Close</td>
<td>Enter the time that your library closes and mark the AM or PM button. If your library is closed that day, leave this field empty.</td>
</tr>
</tbody>
</table>
Chapter 2: General Setup

Specifying Library Addresses

Your library may have one or more addresses, depending on the number of locations you have. You can assign a separate address for each library location.

A location’s address records are used for notices and for Acquisitions purposes. Each location may have up to five address records, one for each “usage.” For some locations, one address record may suffice for all five usages. For some, multiple address records may be useful. (For example, you may define a separate address for billing purposes in order to include special directions, such as “Attention: Accounting Department” or a specific name.)

Here are the ways Horizon groups addresses:

- **Types of Addresses.** Addresses in Horizon can be the physical, billing, shipping, or return address.

- **Default Shipping and Billing Addresses.** Each location has a default address for each type. The default is the address used in most cases. (For example, if most items ordered through Acquisitions are shipped to the main location’s office, that office address would be the default shipping address.) You can set up other addresses for items shipped to other areas of the location.

- **Multiple Addresses of the Same Type.** Each library can have more than one address for the same purpose. (For example, each library location can have several shipping addresses, one for each department that orders items at a university.)

Here is an illustration of addresses assigned to locations:

**Figure 2.1: Multiple and Default Addresses**

<table>
<thead>
<tr>
<th>In this field in the Holidays group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Booking</td>
<td>If your library uses Advance Booking, enter the first booking time for the holiday. If your library is closed that day, leave this field empty.</td>
</tr>
<tr>
<td>Last Adv Booking CKO</td>
<td>If your library uses Advanced Booking, enter the last advance booking checkout time for the holiday. If your library is closed that day, leave this field empty.</td>
</tr>
</tbody>
</table>
To specify library addresses

**View:** location

**Process:** Administration\System Setup\Location Parameters

<table>
<thead>
<tr>
<th>In this field in the Addresses group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Enter a code that identifies the address. This code can contain up to seven characters.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the address.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter the name of the person or a position title. (Leave this field empty if there is no person or department name as the addressee.)</td>
</tr>
<tr>
<td>Lines 1, 2, 3, 4</td>
<td>Enter the address in the Line fields. You can enter the address in any format. Horizon prints the address exactly as you enter it here. If you want to include a fax or phone number with the address, enter it on any line.</td>
</tr>
</tbody>
</table>
## Chapter 2: General Setup

### Usage

An address may have more than one purpose. (For example, if a location has two separate addresses, one for billing and one for shipping, you would have two entries in the Addresses group—each with the appropriate box marked.)

Choose an option that specifies the purpose or use of the address:

- **Physical.** Mark this box to use the street address where borrowers visit. This should be the address of the physical location of this library branch.
- **Return.** Mark this box to use the address printed on notices if the Print Return Address box on the location record is marked. (For more information, see “Setting Up a Location Record” on page 2-21.)

If you specify more than one address for your library in the location record, the address code with the first letter closest to the start of the alphabet and marked as a return address will always print as the return address on notices.

- **Billing.** Mark this box to use an address, other than the default billing address, that you can choose to bill to while you are in Acquisitions. This is the address to which vendors should send bills for materials ordered by this location.
- **Shipping.** Mark this box to use an address other than the default shipping address that you can choose to ship to while you are in Acquisitions.
- **Claiming.** Mark this box to use the address printed on claims for Acquisitions and Serials. If there is no claiming address type for a location, Horizon prints the default shipping address on claims.
- **Def Billing.** Mark this box to use the default billing address that appears on POs printed from Acquisitions.
- **Def Shipping.** Mark this box to use the default shipping address that appears on POs printed from Acquisitions.

### Important

You can have only one address per usage for each location. In other words, only one address at a location should have “Billing” selected. If your library has a location that uses more than one address for billing (for example, your periodicals have a different “Billing” address from the other materials you acquire for your library), talk to your Library Consultant or Customer Relations Manager.
<table>
<thead>
<tr>
<th>In this field in the Addresses group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAN</td>
<td>Enter the European Article Number if your library uses electronic ordering for European transactions. The number or code comes from the vendor.</td>
</tr>
<tr>
<td>SAN</td>
<td>Enter the Standard Address Number if your library uses electronic ordering. (Leave this field empty if your library does not use electronic ordering.)</td>
</tr>
<tr>
<td>Email</td>
<td>Enter the e-mail address that you want to use as the “from” address for this location when sending notices. (For more information on setting up e-mail information for your library, see “Setting Up Email Notification” in the “Defining Notices, Invoices, and Reminders” section of the Circulation Setup Guide.)</td>
</tr>
<tr>
<td>Phone</td>
<td>Enter the telephone number assigned to this location.</td>
</tr>
<tr>
<td>Reply To Address</td>
<td>Enter the e-mail address where you want to receive this location’s e-mail replies when sending notices.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td>You set up a reply to address in this field only if you are overriding default e-mail settings for notices. (For more information, see “Setting Up Email Notification” in the “Defining Notices, Invoices, and Reminders” section of the Circulation Setup Guide.)</td>
</tr>
<tr>
<td>BCC Address</td>
<td>If you always want to send a blind copy of the e-mail messages that this location sends, enter the address that should receive the copy when sending notices.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td>You set up a blind copy address in this field only if you are overriding default e-mail settings for notices. (For more information, see “Setting Up Email Notification” in the “Defining Notices, Invoices, and Reminders” section of the Circulation Setup Guide.)</td>
</tr>
<tr>
<td>Note</td>
<td>Enter information that you want printed on any external correspondence, such as claims or notices. (For example, you could specify circulation desk business hours for notices.)</td>
</tr>
</tbody>
</table>
Specifying Primary and Secondary Locations for Staff Searching

When users search in staff searching, the Copies window automatically displays holdings for the location that the user is logged on to:

If your library has more than one location, the Copies window displays items from the location you have specified as the primary location first. Users can then display items at the other locations (known as “secondary locations”) by clicking All Locations button on the Copies window. If necessary, you can change the text that appears on the All Locations button. If you do not specify a secondary location, the All Locations button will be grayed out.

If you have titles for which you do not create item records, such as serials, you can let users view holdings of the title for all locations in the Bibliographic Detail window in staff searching. To do this, you need to specify each location you want to display on the Bibliographic Detail window as a primary location. Staff searching then displays the holdings for those locations in the Bibliographic Detail window, sorted alphabetically by location.

You need to set up these parameters to specify primary and secondary locations:

- **Primary locations.** The locations with holdings that appear by default in the Copies window.
- **Secondary locations.** The locations with holdings that appear when the secondary location button is chosen.
- **Order.** The order in which staff searching displays each location’s items.

(For examples of setup, see “Examples of Setup for Primary and Secondary Locations” on page 2-43.)
To specify primary and secondary locations for staff searching

**View:** location  
**Process:** Administration\System Setup\Location Parameters

<table>
<thead>
<tr>
<th>In this field in the Locations group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location</strong></td>
<td>Enter the code for the location the primary location can access. Generally, if the location is the one for which you opened the location view, it should be the primary location. However, if you want to display all holdings in the Bibliographic Detail window for the location you are specifying, enter all locations as primary locations here.</td>
</tr>
</tbody>
</table>
| **Primary/Secondary**               | This field specifies that the location acts as a primary or secondary location in relation to the location for which you opened the location table. Do one of these options:  
  - Mark **Primary Location** if you want to assign the location in the Location field as the primary location.  
  - Mark **Secondary Location** if you want to assign the location in the Location field as the secondary location.  
  
  **NOTE**  
  If you want items to be assigned to both a primary and secondary location, mark both options. |
Chapter 2: General Setup

<table>
<thead>
<tr>
<th>In this field in the Locations group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Sort Order                          | Enter the numerical order in which staff searching displays holdings for the location in the Copies window.  
(For example, if you have two primary Locations, A and B, and you want holdings from Location B to display before holdings from Location A, you would assign a sort order of “1” for Location B and a sort order of “2” for Location A.) |
| Staff Only                          | Do one of these options:  
• Mark this box if you want to limit the display of this location’s holdings to library staff only.  
This option becomes active only if you build public-only versions of your bib-based PAC indexes.  
• Clear this box if you want to let staff view holdings for this location. |
| Primary Label                       | Enter the name you want to appear on the button that displays holdings for the primary location.  
This is the button that toggles from the list of items at secondary locations to the list of items at primary locations.  
Specify only one primary label for each location. (For example, you might name this button “This Location.”) |
| Secondary Label                     | Enter the name you want to appear on the button that displays holdings for secondary locations.  
This is the button that toggles from the list of items at primary locations to the list of items at secondary locations.  
Specify only one secondary label for each location. (For example, you might name this button “Other Locations.”) |
Examples of Setup for Primary and Secondary Locations

Here are some examples of setup for primary and secondary locations:

<table>
<thead>
<tr>
<th>If you want to display this</th>
<th>Do this</th>
</tr>
</thead>
</table>
| All holdings from several locations in the same building at the “primary” level. | 1 In the **Locations** group, create a location group entry for each location you have in the building.  
2 Mark the **Primary Location** option for each location.  
3 In the **Sort Order** field, enter the numerical order that staff searching displays holdings for each location in the Copies window.  
All locations’ holdings will display in the main Copies window in the order you specified in the Sort Order field. |
| All holdings for your secondary locations in an order other than alphabetical by location code | 1 In the **Locations** group, create a location group entry for each secondary location.  
2 Mark the **Secondary Location** option for each location.  
3 In the **Sort Order** field, enter the numerical order that staff searching displays holdings for each secondary location in the Copies window.  
When you click the Secondary Location button in the Copies window, all holdings from your secondary locations will display in the order you specified in the Sort Order field. |
Setting Up Parameters for a Reserve Location

If you use Reserve Bookroom, you need to set up certain parameters that apply to that specific location. (For more information, see the Reserve Bookroom Guide.)

To set up parameters for a reserve location

| View: location | Process: Administration\System Setup\Location Parameters |

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor Letter</td>
<td>Enter a note for instructors to inform them that their reserve item is about to go off reserve. (Leave this field empty for every location that is not specifically representing a reserve bookroom.)</td>
</tr>
<tr>
<td>CKI Note on “RB”</td>
<td>Enter a note that Horizon generates and displays in Circulation when an item flagged for reserve is checked in. (Leave this field empty for every location that is not specifically representing a reserve bookroom.)</td>
</tr>
<tr>
<td>CKI Note on “RW”</td>
<td>Enter a note that Horizon generates and displays in Circulation when an item flagged for withdrawal from reserve is checked in. (Leave this field empty for every location that is not specifically representing a reserve bookroom.)</td>
</tr>
</tbody>
</table>

This field has a 255-character limit.
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instr. Mailing Label</td>
<td>Enter or choose the code for the type of label set up you want to use for instructor letters. You can change this after you have set up your own label sets.</td>
</tr>
<tr>
<td>Default Reserve Location</td>
<td>Enter or choose the code for a reserve default location. When you activate a Reserve Bookroom process, this is the location the process defaults to so you do not have to switch locations every time. (For example, you have to perform all reserve tasks in the Reserve Location. You can set a default for Reserve Bookroom to always open to the Reserve location.)</td>
</tr>
</tbody>
</table>
Chapter 2: General Setup

Specifying Serials Checkin Locations

If you use Serials, you need to set up certain parameters that apply to that specific location. If the location you are setting up checks in and claims serial issues for the other locations, you enter each location in the SCKI Locations group in the location view in the Table Editor.

To specify Serials Checkin locations

View: location
Process: Administration\System Setup\Location Parameters

For instructions on setting up due dates in this group, see “Specifying a Fixed or Final Due Date” in the “Setting Up or Editing Basic Circulation Policies” section of the Circulation Setup Guide.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCKI Location</td>
<td>Enter or choose the code for the location whose serials issues are checked in and claimed by location you are defining. If the location you are defining checks in and claims its own serial issues, enter the code for the location you are defining.</td>
</tr>
<tr>
<td>Hide Next Expected Issue</td>
<td>Mark this box if you do not want the next expected serial issue to display in staff searching or PAC.</td>
</tr>
</tbody>
</table>
Setting Up Home Service Parameters

Horizon Home Service is an extension of library services for people who are hospitalized, ill, or otherwise unable to visit the library. (For example, if a student is recovering from an accident, you can mail or deliver items to his or her home once a week.) If you use Home Service, you need to set up certain parameters that apply to that specific location. (For more detailed information and instructions for setting up and using Home Service, see the Home Service Guide.)

To set up Home Service parameters

**View:** location

**Process:** Administration\System Setup\Location Parameters

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>HS Rating</td>
<td>Mark this box if you want to display a Home Service rating prompt when you check in items from standard Home Service borrowers.</td>
</tr>
<tr>
<td>HS Std Issue Slip</td>
<td>Mark this box if you want to be able to print issue slips for standard Home Service borrowers.</td>
</tr>
<tr>
<td>HS Institution Issue Slip</td>
<td>Mark this box if you want to be able to print issue slips for institution Home Service borrowers.</td>
</tr>
</tbody>
</table>
Displaying Blocks from Another Location

By default, each location displays blocks for only its own borrowers and for borrowers at any shared locations you have set up. You can change the default and specify for each location which other locations’ borrower blocks Horizon displays.

For example, if you have three locations and you want location 1 to show all three locations blocks, you can identify location 2 and location 3 as block locations for location 1. If you want location 2 to show only its own and location 3’s blocks, you can identify location 3 as a block location for location 2.

To display blocks from another location

<table>
<thead>
<tr>
<th>View:</th>
<th>location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process:</td>
<td>Administration\System Setup\Location Parameters</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block Loc’s</td>
<td>Enter or choose the code for the location that you want to display other locations’ blocks.</td>
</tr>
</tbody>
</table>

Collections

Collections let you group related items that are shelved together within the library. Items can be related by format, literary style, or reading level. Some examples of collections include fiction, nonfiction, and reference items. You should create a collection code for each group of items.

In addition, you can specify whether items of a specific collection belong to the location where the items are returned, instead of sending them back to their original checkout location. This is called a floating location.

Some of your item and bib records also may have been temporarily added to your database through the “fast-add” process. You might not want to index these records until catalogers can create complete, accurate bib records for these titles, or because these titles will not be housed in the main stacks.
When you set up a collection record, you determine whether fast-adds belonging to a collection are indexed. Items must be indexed if you want them to be searchable. Indexed titles appear in staff searching and PAC; unindexed ones do not. If fast-added records are not showing up in staff searching and PAC and you want them to, check the collection view to verify it is set to be indexed.

NOTE
For information on how to control the data recorded for fast-adds, see "Specifying Bib Information in Fast-Added Records" in the Cataloging Setup Guide.

You determine these parameters when you create a collection:

- The collection’s code and description
- The collection’s description for a title that appears in staff searching windows
- The collection’s description that is printed on spine labels
- The item statistical class for items in the collection
- The call number type for items in the collection
- Whether items in the collection are put in the call number index
- Whether “fast-added” items in the collection are indexed

NOTE
You can generate statistics for collections by assigning a collection ISTAT to each collection you create. You can also generate statistics by assigning a call number type to a collection. Then you can view these statistics in Day End reports. (For more information, see “Collection Item Statistical Classes [ISTATs]” on page 2-56 and “Call Number Types” on page 2-58.)

This section explains these topics:

- Setting Up or Updating a Collection
- Setting Up a Floating Collection

Setting Up or Updating a Collection

You set up your collections at installation. You can create or update your collections anytime. (For example, if you add a new rare books section to your library, you can create a new collection for it.)

IMPORTANT
You can change the code of an existing collection if items have not yet been assigned to the code. You can also delete collection codes. However, do not delete codes that are already assigned to items on Horizon. If you need to delete collection codes that already have items assigned to them, call Horizon Customer Support.
Before You Begin

Complete these tasks:

- Set up item statistical classes as explained in “Collection Item Statistical Classes (ISTATs)” on page 2-56.
- Set up call number types as explained in “Call Number Types” on page 2-58.
- Review the items in your library to identify any collections that you want to create.

To set up or update a collection

<table>
<thead>
<tr>
<th>View:</th>
<th>collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process:</td>
<td>Administration\System Setup\Collection Codes</td>
</tr>
</tbody>
</table>

![Edit: Collection Codes]

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection Code</td>
<td>Enter a code for the collection. This code can contain up to seven characters. (For example, you may enter “FIC” for a fiction collection.)</td>
</tr>
</tbody>
</table>

**NOTE**

Do not worry about duplicating codes used in other contexts (such as the collection ISTAT). In fact, SirsiDynix recommends using the same codes throughout Horizon when describing the same materials, such as always using “PB” to identify paperbacks, whether it be for an ISTAT or a collection code. Although you can always look up codes, it may be easier for library staff to memorize common codes and manually enter them. This is easier to do if codes are consistent throughout the system.
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Enter a description for the collection. This description displays on statistical reports and should be unique for each collection in your library or consortium member. If you are a member of a consortia, you might want to enter a description that describes the location (for example, “Main Periodicals”).</td>
</tr>
<tr>
<td>PAC Description</td>
<td>Enter the collection’s description that you want to appear for titles in PAC displays. (You cannot leave this field empty.) This field can contain up to thirty-one characters.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>If you want the location to display for Serials Copies in PAC, you include that as part of this PAC description.</td>
</tr>
<tr>
<td>Spine Label Descr.</td>
<td>Enter the collection’s description that you want printed on spine labels. This code can contain up to eight characters.</td>
</tr>
<tr>
<td>Call No. Type</td>
<td>Enter or choose the code for the call number type you want. The call number type lets you break collections into groups of call numbers, to create groups of similar topics. (For example, you could divide the non-fiction collection into science, humanities, and political science groups according to their call numbers.) Statistics will then be generated separately for each group. (For more information, see “Call Number Types” on page 2-58.)</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>You can assign more than one collection to a single ISTAT. For example, you may want to divide the items in the reserve bookroom to separate collections, “Reserve Periodicals” and “Reserve Textbooks.” But you may not want to generate separate statistics for the items. Therefore, you would assign both collections the same ISTAT. (For more information, see “Collection Item Statistical Classes [ISTATs]” on page 2-56.)</td>
</tr>
<tr>
<td>Item Statistical Class</td>
<td>Enter or choose the code for the ISTAT that you want to use for this collection. When you assign an ISTAT to a collection, that ISTAT is automatically assigned to any items with this collection. Horizon uses this ISTAT to generate statistics for the items to which it is assigned.</td>
</tr>
<tr>
<td>Index Fast-Add</td>
<td>If you want fast-added items in this collection to show up in staff searching, to be included in other indexes, and to show on overdue notices, mark this box. (For more information on collections and fast-added items, see “Collections” on page 2-48.)</td>
</tr>
</tbody>
</table>
In this field | Do this
--- | ---
Fast-Add Code | If items in this collection can be fast-added, choose the process for checking in the items:

- **No special handling at checkin.** The record remains unchanged in the database. Horizon does not alert the circulation staff to send the item to cataloging; the item is checked in and shelved.

- **Send to cataloging at checkin.** Horizon alerts the circulation staff to send the item to cataloging, but it does not delete the fast-add bib or item record.

- **Checkin will delete the item.** Horizon deletes the fast-add item record but not the bib record. Using this option for temporary item records saves you from having to delete them in a separate step.

- **Checkin will delete the item and bib.** Horizon deletes both the fast-add item record and bib record. Using this option for temporary bib and item records saves you from having to delete them in a separate step.

- **Delete item at owning location.** This ensures that if an item is checked in at a location other than the owning location, it is transited to the owning location rather than being deleted where it was checked in. In order to use this feature, you must either update the existing collection codes used for ILL or create new ones.

- **Delete item and bib at owning location.** In order to use this feature, you must either update the existing collection codes used for ILL or create new ones.
<table>
<thead>
<tr>
<th><strong>In this field</strong></th>
<th><strong>Do this</strong></th>
</tr>
</thead>
</table>
| Avg. Replace Cost | Enter the amount charged as a replacement cost if no price exists on the bibliographic record for an item. The amount you enter should be the average cost of all the items assigned to this collection. (For example, enter “5.00” or “19.95”.)  
**NOTE**  
This average replacement cost is what the ITYPE uses to compute maximum fines, if the maximum fine is set to be a percentage of the average replacement cost. The maximum fine is specified in the ITYPE table. (For more information, see “Defining Item Circulation Types [ITYPES]” in the “Preparing Horizon to Work with Item Records” section in the *Circulation Setup Guide*.) |
| Label Set | Enter or choose a code to specify the label set that you want to assign to the collection. (Leave this field empty if no labels apply to the collection.)  
**NOTE**  
A label set consists of predefined labels and line information printed on the labels. You should have determined your call number types and ranges during implementation and then created those types during installation. |
| Serials Label Set | Enter or choose a code to specify the serial label set that you want to assign to the collection (if you use Horizon to produce spine labels). |
| Selfcheck Sort Bin | Enter or choose a code to choose the bin in which you want borrowers to return items they check in when using the 3M SelfCheck machine. You would use this field if you have separate bins available for these items. |
| Floating | Mark this box if you want checked in items to “belong” to the location they are returned to instead of routing them back to their owning location. (For more information, see “Setting Up a Floating Collection” on page 2-54.) |
| Misshelved Rpt | If you use Horizon Inventory, do one of these options:  
- Mark this box if you want items in this collection reported as misshelved on the Inventory Exceptions report.  
- Clear this box if you do not want items in this collection reported as misshelved on the Inventory Exceptions report.  
(For example, you would not track misshelved items while you take inventory of items on a shelving cart.) |
Chapter 2: General Setup

Setting Up a Floating Collection

Some libraries want items that are checked in to “belong” to the location where the items are returned, instead of sending them back to their original checkout location. (For example, a multi-branch library may have video or audio items they want to remain at the location where they are checked in.) You can do this by setting up a “floating collection.” The floating collection helps you avoid the expense of sending items back to the item’s original owning location.

Here are some things to consider when setting up floating collections:

- When circulation staff checks in an item that is assigned to a floating collection, its location changes to the checkin location regardless of whether the item is linked to a copy record or not. (For example, item and copy location will be different.)
- Horizon allows you to specify circulation rules for a floating collection based on the item type, item location, or circulation location so that some items in the collection can be in the same collection, but not floating. These items would then be marked to be sent back to the original owning library. For more information, see “Setting Up Restrictions for a Floating Collection” in the “Setting up Circulation Privileges and Parameters” section of the Circulation Setup Guide.
- The location change happens even for items that are on reserve or are checked into a reserve location circulation station. To prevent items which are on reserve from having the location changed, you should specify a circulation rule to prevent items owned by the reserve location from floating.
- When you check in an item that is assigned to a floating collection, due dates, fines, and so forth will be based on the item’s owning location or the circulating location depending on how you have set up the Circ Settings by field in the matham (System-wide Parameters) table. (For more information on the Circ Settings by field, see “System-Wide Settings” on page 2-4.)

NOTE

If the item checked in is assigned to a floating collection, and the checkin location is a shared location, the item’s location will not change. However, if the item’s location is a master location, the location will be changed to the login location. (For more information, see “Setting Up a Single Circulation Station for Multiple Locations” in the Circulation Setup Guide.)

Before You Begin

Complete these tasks:

- Set up item statistical classes as explained in “Collection Item Statistical Classes (ISTATs)” on page 2-56.
- Set up call number types as explained in “Call Number Types” on page 2-58.
- Determine which existing or new collections you want to be floating collections.

To set up a floating collection

1. Open the collection view in the Table Editor, or start the Collection Codes process. The default location of this process is the Administration\System Setup folder on the navigation bar.

Horizon displays the List Collection Codes window.
2 Choose the collection you want to set up as floating. Horizon displays the Edit Collection Codes window.

3 Click **Page Down** until you display the Floating option:

4 Mark the **Floating** box to make this a floating collection.

5 Save your changes.
Collection Item Statistical Classes (ISTATs)

Collection item statistical classes (ISTATs) track circulation statistics on collections. You can then use the AdHoc Statistical Report Generator to create reports for these ISTATs. (For more information on the AdHoc Statistical Report Generator, see “Generating AdHoc Statistical Reports” on page 6-32.)

If you want to track separate statistics for a collection, you can assign it to its own ISTAT, for example:

![Figure 2.2: Separate ISTATs for Each Collection]

If you want combined statistics for a group of collections, you can assign them to the same ISTAT, for example:

![Figure 2.3: ISTATs for Combined Collections]

**NOTE**

More than one collection can use the same ISTAT, but a single collection cannot use more than one ISTAT.

You assign an ISTAT to a collection by entering the ISTAT in the collection’s record. When cataloging staff creates item records, they enter a collection for each item. That collection determines the item’s ISTAT. (For information on setting up collections, see “Setting Up or Updating a Collection” on page 2-49.)

**NOTE**

You create your library’s ISTATs during implementation. You should not delete ISTATs once you have assigned them to collections. However, you can update the description for an ISTAT any time. You can generate more detailed statistics by assigning a call number type to a collection. (For more information, see “Call Number Types” on page 2-58.)
To set up collection item statistical classes

**View:**  istat  
**Process:**  Administration\Statistics Control Menu\Item Statistical Classes

![Edit Item Statistical Classes](image)

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Item Stat. Class| Enter the code that identifies the item statistical class (ISTAT).  
This code can contain up to seven characters. |
| Description     | Enter a description of the ISTAT.  
This field has a 255-character limit. |
Call Number Types

Horizon comes with seven default call number types:

- Library of Congress
- Dewey Decimal
- National Library of Medicine
- Universal Decimal Classification
- Superintendent of Documents
- Local
- Local-Not Indexed

If you want to, you can set up new call number types, or update the default call number types. You determine these parameters when you create call number types:

- How call numbers are processed
- The call number index in which call numbers appear
- Which statistics are reported by call number
- Where a call number is broken for spine labels

NOTE

Horizon comes with a default set of indexes, processors, and spine breakers used to define call number types. If you need to change these defaults or set up a call number type that is based on indexes, processors, or spine labels different from the defaults, consult your Library Consultant or Project Lead.

Before you change your call number types, you need to understand how call number types interact with other aspects of the Horizon system:

- **Processing call numbers for indexing.** Call numbers that go in the same index should be processed by the same processor. For example, you may set up one call type for adult non-fiction materials and another call type for juvenile non-fiction materials, both using the Dewey Decimal System. You might want all the call numbers to appear in the Dewey Call Number Browse index, yet have the statistics maintained separately. Each call_type would be assigned the same index and the same processor.

- **Call numbers and spine breakers.** When you set up a call number type, you determine which spine breaker code you want to use. The spine breaker determines where call numbers will be divided when they are printed on spine labels.

- **Call numbers, collections, and statistics.** Call number types let you generate detailed circulation statistics about a collection according to its call number type and range. For example, you could generate statistics for books on sculpture (Dewey Decimal call numbers 730 to 738) or statistics for books on fishing and hunting (799 to 799.9). In addition, you can break down a call number type (such as Dewey Decimal or Library of Congress) into call number ranges (such as AC-AE, AF-AG, and so forth). Your ranges can be as narrow or as broad as you want. Horizon tracks statistics for the ranges in each type.

Before you can break a collection down into call number groups for statistics, you must first identify the call number type used by a collection. Some libraries use only standard call numbers (Library of Congress or Dewey Decimal), while others use local call numbers that may or may not be based on the standards. You can also use a combination of standard and local call numbers within a single library. (You assign a collection to a call
number type by entering the type in the collection’s record. When you create item records, you assign a collection to the item. That collection determines the call number type for the item.

More than one collection can use the same call number type, which may limit the detail of your statistical reports. For example, if a public library has audio/visual and juvenile collections using the same call number type, the reports will not indicate what collection the items come from. In this case, you may want to add separate call number types for juvenile and audio/visual materials to collect separate call number statistics for these collections. To do this, add new call number types with codes such as “Avddc” or “Avlc.”

You define the call number types by assigning ranges of call numbers to call number types. If you want separate statistics for a range, assign the range to its own group. (For example, if you want separate statistics for books with call numbers that begin with a letter between BF and BG, assign that range to its own group. If you want combined statistics for several ranges, assign them to the same group.)

**Before You Begin**

Before creating call number types, set up these items:

- Item statistical classes, explained in “Collection Item Statistical Classes (ISTATs)” on page 2-56.
- Spine breaker categories, explained in “Specifying Spine Breaker Categories” on page 2-81.
### To set up call number types

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call No. Type</td>
<td>Enter the code that identifies the call number type. This code can contain up to seven characters. (For example, you might enter “lc” to refer to the Library of Congress call number system.)</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the call number type.</td>
</tr>
</tbody>
</table>
| MQ Index | Enter or choose the code for the search index that determines how the items of the call number type are indexed. Use one of these default indexes corresponding to the appropriate call number type:  
  - `calldd`. Dewey Decimal call numbers.  
  - `callsd`. Superintendent of Documents call numbers.  
  - `calludc`. Universal Decimal Classification call numbers. |
### Call Number Types

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Processor              | Enter or choose the code for the processor that you want.  
The processor determines how call numbers of a call type are processed during retrieval. These are the default processors that you can use:  
- **dewey.** Dewey Decimal call number processor.  
- **lc.** Library of Congress call number processor.  
- **nlm.** National Library of Medicine call number processor.  
- **sudoc.** Superintendent of Documents call number processor.  
- **udc.** Universal Decimal Classification from the call number or MARC tag. |
| Spine Breaker          | Enter or choose for the spine breaker code that controls how lines break on printed spine labels.  
A spine breaker code specifies a procedure used to break up the call number for printing spine labels. These are the default spine breaker codes that you can use:  
- **dewey.** Dewey Decimal call number spine breaker.  
- **lc.** Library of Congress call number spine breaker.  
- **nlm.** NLM call number spine breaker.  
- **sudoc.** Superintendent of Documents call number spine breaker.  
- **udc.** Universal Decimal Classification call number spine breaker.  
(For more information, see “Specifying Spine Breaker Categories” on page 2-81.) |
Call Number Item Statistical Classes (Call ISTATs)

Horizon comes with default call number item statistical classes (call ISTATs) already assigned to Dewey Decimal and Library of Congress call number groups.

If you want to, you can update the default call number ISTATs, or add additional ISTATs to break down the call number groups into more specific categories.

**NOTE**

To keep call number ISTATs grouped together in alphabetical lists, the default call number ISTATs follow these naming conventions:

- Dewey Decimal call number ISTAT codes begin with the letter “z.”
- Library of Congress call number ISTAT codes begin with the number “1.”

**Before You Begin**

Check your default call number ISTATs to determine if you want to update any of the defaults, or add additional call number ISTATs.
To update call number item statistical classes

**View:** call_istat  
**Process:** Administration\Statistics Control Menu\Call # Item Stat Classes

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call No. Type</td>
<td>Enter or choose the code for the call number type for which you are assigning an ISTAT code.</td>
</tr>
<tr>
<td></td>
<td>(For example, enter “LC” for the Library of Congress call number type, or “DDC” for the Dewey Decimal call number type.)</td>
</tr>
<tr>
<td>Beginning Call No.</td>
<td>Enter the beginning call number for the group of call numbers to which you are assigning this ISTAT code.</td>
</tr>
<tr>
<td></td>
<td>(For example, enter “AC” or “070”.)</td>
</tr>
<tr>
<td>Istat Code</td>
<td>Enter or choose the code for the appropriate ISTAT.</td>
</tr>
</tbody>
</table>
Borrower Statistical Classes (BSTATs)

Borrower statistical classes (BSTATs) let you generate statistics for groups of borrowers who use your library. (For example, you can create BSTATs for age groups and geographical areas for public libraries, year in school and academic major in academic libraries, and job position or department in special libraries.)

You assign a borrower a BSTAT by entering the BSTAT in his or her borrower record. You can assign multiple BSTATs to a borrower. Then you can generate daily, monthly, hourly, and snapshot reports by running the Day End Circulation Statistics process. (For information on generating reports, see “Generating AdHoc Statistical Reports” on page 6-32.)

**NOTE**

You should have determined your BSTATs during implementation and then created them during installation. You can update the description for a BSTAT at any time. If you want to delete a BSTAT, call Horizon Customer Support for help.
To set up borrower statistical classes

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>BStat Code</td>
<td>Enter an alphabetical or alpha-numeric code to identify a borrower group at your library. This code can contain up to seven characters.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter the name or description of the borrower group. This description will appear on AdHoc Reports.</td>
</tr>
<tr>
<td>No. of Borrowers</td>
<td>This display-only field shows the number of borrowers currently assigned to the BSTAT.</td>
</tr>
</tbody>
</table>

**Labels**

Horizon lets you print the different types of labels for items or borrower notices. Horizon uses information that is stored in tables and bib records to generate these labels. Here are some of the labels you can print:

- **Spine labels and card labels for Cataloging and Serials.** You assign each collection the type of spine label and card label that is printed for items in that collection. Then, you can print the labels for each item using Cataloging or Serials Checkin.
Borrower mailing labels. These labels consist of borrower information that Horizon prints on notices for mailing to borrowers. These are not labels that you peel and stick, as are cataloging labels, but lines of printed information included on notices. You assign the type of borrower mailing label printed at each location.

Before you print these types of labels, you need to define how you want the labels appear, including the label’s dimensions, fonts, and contents. You also need to define how you want call numbers to display on spine labels.

This section explains these topics:

- Defining Label Sets
- Defining Label Dimensions
- Setting Up Label Fonts
- Mapping Label Fonts
- Choosing New Font Settings when Printing Spine Labels
- Defining Label Content
- Specifying Spine Breaker Categories
- Setting Up Spine Label Exporting

Defining Label Sets

A label set is a group of labels used for a particular purpose, such as Cataloging spine labels or borrower mailing labels. A sheet of labels can have several label sets. This figure shows three label sets, each containing two labels:

Figure 2.4: Label Set
Each label in the set might be used for a different purpose. (For example, a cataloging label set might have two labels per set: one used as a spine label; the other used as a card label.) This figure illustrates two types of cataloging labels in a set:

**Figure 2.5: Labels on a Label Set**

Horizon comes with several default labels that you can use as samples as you create your own.

To define label sets, you specify:

- What the label set is used for: Cataloging spine labels or borrower mailing labels.
- How many labels the label set consists of.
- The total length and width of the label set.
- The length and width of each label on the set.

**To define label sets**

1. Open the label view in the Table Editor.
   Horizon displays the List Label-set Definition window.

2. Choose the label set definition that you want to change, or create a new label set definition.
   Horizon displays the Edit Label-set Definition window:
The top portion of the window lets you define the general characteristics of the label set as a whole, and the bottom portion provides a group where you define the dimensions of each label in the set.

3 Complete these fields to define the label set:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Enter the code that identifies the label set. (For example, you might enter “bormail” for borrower mailing labels.)</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the label.</td>
</tr>
<tr>
<td>No. of Lines High</td>
<td>Enter the total number of lines that run from the top to the bottom of the label set—count the first line as “0.”</td>
</tr>
<tr>
<td>Usage</td>
<td>Mark one of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Cat Spine Set.</strong> Specifies the label as a cataloging spine label.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Borrower Mailing.</strong> Specifies the label as a borrower mailing label.</td>
</tr>
</tbody>
</table>

4 Continue with “Defining Label Dimensions” on page 2-69.
Defining Label Dimensions

You need to define the dimensions of a label including the width and length of:

- The label set.
- Each label in the set.

Dimensions are measured in lines and columns. Lines comprise the length of the set or a label; columns comprise the width. To determine these lines and columns, measure the number of characters and lines contained in an inch as printed by the printer used for labels. These characters become the columns and the lines become the lines.

This example illustrates the lines and columns of a label set:

Figure 2.6: Label Dimensions

To measure the dimensions of a label set or an individual label, you determine these things:

- How many lines are on a label set.
- How many lines are on each label.
- How many columns are on each label.
- What line number a label begins with (the line number of the top-most line).
- What column number a label begins with (the column number of the left-most column).
For example, Figure 2.6: Label Dimensions on page 2-69 would have these dimensions:

<table>
<thead>
<tr>
<th>Label</th>
<th>No. of Lines</th>
<th>No. of Columns</th>
<th>Top-most Line</th>
<th>Left-most Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label set</td>
<td>18</td>
<td>25</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Label #1</td>
<td>8</td>
<td>6</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Label #2</td>
<td>8</td>
<td>18</td>
<td>0</td>
<td>8</td>
</tr>
</tbody>
</table>

Note that a label may start on a line or column number other than zero.

**NOTE**

Print some text using the printer, font, and size of text you will use for labels. Use this text to measure how many characters are printed per inch and how many lines are printed per inch.

**To define label dimensions**

1. Open the `label_dimension` view in the Table Editor. Horizon displays the Edit Label-set Dimensions window.
2. Choose the label dimension you want to change, or create a new label dimension. Horizon displays the Edit Label-set Dimensions window:
Complete these fields to set up the label dimensions of each label:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label Set</td>
<td>Enter or choose the code for the label set that the label belongs to.</td>
</tr>
<tr>
<td>Label #</td>
<td>Enter the number of the label. Assign numbers from left to right and top to bottom.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a brief description of the label.</td>
</tr>
<tr>
<td># of Lines</td>
<td>Enter the total number of lines on the label.</td>
</tr>
<tr>
<td>From Top</td>
<td>Enter the line number of the label set at which the first line of the label is printed.</td>
</tr>
<tr>
<td># of Columns</td>
<td>Enter the total number of columns wide the label is. This number determines how wide the text printed on the label can be. Each character is a column and letters, numbers, and spaces are all characters.</td>
</tr>
<tr>
<td>From Left</td>
<td>The column number of the label set at which the first column of the label is printed.</td>
</tr>
</tbody>
</table>

Save your changes.

Once you have defined the label set, you can set up the font and contents of each label using the steps in the next three sections.

### Setting Up Label Fonts

You can print each part of the label in a font that you set up. The label dimensions are still based on the default font (courier, 50 x 30), which is uneditable.

After you set up a new label font, you define the parts of the label you want to use that font in the label_contents view. (For more information, see “Defining Label Content” on page 2-76.) When you print labels in Cataloging or Serials Checkin, a Select Font button on the Print dialog box lets you define font style and point size for the new label font.

**NOTE**

Because you can define new fonts, you can define a barcode font (letting you print barcodes). This eliminates the need to purchase a separate barcode printer.

To set up label fonts

1. Open the label_font view in the Table Editor.
   - Horizon displays the List Label Fonts window.
2. Click New.
Horizon displays the Edit Label Fonts window:

3 Complete these fields to set up the label font:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label font</td>
<td>Enter the name of the label font in the field.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter the label font description in the field.</td>
</tr>
<tr>
<td>Font name</td>
<td>Enter the name of the font you want to use for labels.</td>
</tr>
<tr>
<td>Point size</td>
<td>Enter the point size of the font you want to use for labels.</td>
</tr>
<tr>
<td>Weight</td>
<td>Enter the weight of the font you want to use for labels.</td>
</tr>
<tr>
<td>Style</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark the <strong>Italic</strong> box if you want the font to display in italics on the label.</td>
</tr>
<tr>
<td></td>
<td>• Mark the <strong>Underline</strong> box if you want the font to display underlined on the label.</td>
</tr>
<tr>
<td></td>
<td>• Mark the <strong>Strikeout</strong> box if you want to display a strikeout line through the font on the label.</td>
</tr>
</tbody>
</table>

4 Save your changes.

5 Continue with “Mapping Label Fonts” on page 2-73.
Mapping Label Fonts

In order to use fonts other than the default fonts on labels, you must define new label fonts and map those fonts to an actual print font that you have loaded on your workstation.

Before You Begin

You must make sure you have already set up label fonts. (For more information, see “Setting Up Label Fonts” on page 2-71.)

To map label fonts

1. Start the print process for the labels with the default font you want to change.
2. Run the print process until Horizon displays a window like this:

   ![Print Process Window](image)

   Horizon displays the Label Printer Setup window:

   ![Label Printer Setup Window](image)

3. Click **Page Setup**.
   Horizon displays the Label Printer Setup window:

   ![Label Printer Setup Window](image)

4. Click **Font Mapping**.
   The system displays the List Label Fonts Mapping window. (The system should list the label font you just defined. If not, define the font again using the steps in “Setting Up Label Fonts” on page 2-71.)

5. Double-click on the font you just defined.
   The system displays the Font window.

6. Highlight the font, font style, and size of the font that you want to appear on the label.

7. Click **OK**.
You can now print the label with the new font. Once you set up label fonts, you can define the content printed on each label of the set.

**Choosing New Font Settings when Printing Spine Labels**

You can choose a new font, type, and size other than the default before you print spine labels. When you choose new font settings, the settings are valid only for the workstation on which you changed the font settings and only for the session for which you are logged in to Horizon. This feature also makes mapping label fonts no longer necessary.

**To choose new font settings when printing spine labels**

1. Do one of these options:

<table>
<thead>
<tr>
<th>If you want to print labels from a List Items window</th>
<th>If you want to print labels using barcodes</th>
</tr>
</thead>
</table>
| 1. Open the List Items window that contains the items for which you want to print labels.  
   (For instructions, see “Opening a List of Items” in the “Item and Copy Records” chapter of the Cataloging Guide.)  
   2. Highlight the items for which you want to print labels.  
   3. Choose Items, Print Spine Labels. | 1. Gather the barcode numbers of the items for which you want to print labels.  
   2. Start the **Batch Print Spine Label** process.  
   The default location of this process is the **Cataloging\Item Record** folder on the navigation bar.  
   Horizon opens the barcode print dialog box:  
   ![Barcode Print Dialog Box](image)  
   3. Enter the barcode for the label that you want to print.  
   4. Click **OK**. |
Horizon opens a label printing window:

2 If you want to confirm or alter the printing information, do these steps:

   1 Click **Page Setup**.
   2 Make any necessary changes.
   3 If you want to change font settings, choose **Select Font**, choose the font settings, and click **OK**.
   4 Click **OK**.

3 Choose the set of labels that you want to print from the drop-down menu.
   If you want to edit the label, click on the label display and edit it as you would if you were using a word processor.

4 Do one of these options:
   - If you are printing labels for only one item, click **Print**.
   - If you are printing labels for multiple items, click **Print All**.
   Horizon prints the labels.
   If you printed item labels from the List Items window, the task is finished.
   If you printed labels using the Batch Print Spine Label process, Horizon displays the empty barcode window.

5 Enter the barcode of the next item for which you want to print labels.

6 Click **OK**.
   Horizon opens the label printing dialog box for the next label.

7 Repeat steps 3 through 6 until you have printed all the labels that you want.

8 When you have finished printing, click **Cancel** on the label printing window.
   Horizon returns you to the barcode window.

9 Click **Cancel**.
   Horizon returns you to the MARC Editor.
Defining Label Content

You need to define the label content or information that you want to print on your labels. (For an example on how to complete this task, see “Examples of Label Contents Setup” on page 2-79.)

To define the contents of a label, you need to specify these things:

- The information—title, author, and call number, or borrower, address, and zip code—printed on each line of a label within a label set.
- How information appears when printed (how many columns and how many lines).

**NOTE**

How lines break on a cataloging spine label depends on two factors:

- The type of call number (Library of Congress, Dewey Decimal, etc.) entered in the item record.
- How the call number is entered (for example, with or without slashes, spaces, periods, etc.) in the item record.

Before You Begin

You must make sure you have already defined label sets. (For more information, see “Defining Label Sets” on page 2-64.)

Additionally, to identify the information you want to include on a label, you must know the table and column or the MARC map where the information is stored on the Horizon database. (For example, collection information is stored in the “collection” column in the “item” table.) A MARC map is a systematic method for extracting library information stored in MARC records. (For a list of tables and columns, see the Table Structures Guide. For more information on MARC maps, see “MARC Maps” on page 2-93.)
To define label content

1. Open the **label_content** view in the Table Editor.
   Horizon displays the List Label Content Definition window. Each line or part of a label constitutes a row in this list. If a label has three parts (collection, call number, and copy number), there will be three rows in the list for that label.

2. Choose the label content definition you want to change, or create a new label content definition.
   Horizon displays the Edit Label Content Definition window:

   ![Edit Label Content Definition](image)

3. Complete these fields to define the label contents:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Enter or choose the label set the label belongs to.</td>
</tr>
<tr>
<td>Label font</td>
<td>Enter or choose the label font that you want to use for that label.</td>
</tr>
<tr>
<td>Label #</td>
<td>Enter the number of this label. Number labels from left to right and from top to bottom. (For example, the upper-left label is 1; the upper-right is 2, and so forth.)</td>
</tr>
<tr>
<td>Line # (0 indexed)</td>
<td>Enter the line number that the first item of information appears on. (For example, if you are editing or defining the first line in spine labels, the first line is the collection and is line “0.” The next line, in the next group entry, would be “1”, and so forth.)</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Column # (0 indexed)</td>
<td>Enter the column number that the first item of information appears on. (For example, if you are editing or defining the first column, you would enter “0”. The next column, in the next group entry, would be “1”, and so forth.)</td>
</tr>
<tr>
<td>Prefix</td>
<td>Enter any information you want printed before the label contents.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>The Prefix and Suffix fields are useful for serials labels where you want to identify the location, copy number, and so forth. (For an example of label contents for serials labels, see Figure 2.8: Serial Label Contents Setup on page 2-80.)</td>
</tr>
<tr>
<td>Suffix</td>
<td>Enter any information you want printed after the label contents.</td>
</tr>
<tr>
<td>Table Name</td>
<td>Enter the name of the table where the label information is stored.</td>
</tr>
<tr>
<td>Col. Name (or MarcMap)</td>
<td>Enter the column name or MARC map where the label information is stored. This field lets you specify the bibliographic information, such as title and author, holdings, serials issue, or borrower information retrieved through MARC maps.</td>
</tr>
<tr>
<td>Max Lines</td>
<td>Enter the number of lines that can be used when printing or displaying the information for the first line; the first line may actually contain two lines of information.</td>
</tr>
<tr>
<td>Max Columns</td>
<td>Enter the total number of columns that can be used when printing or displaying the information for this entry; this field lets you limit the width of printing to ( n ) columns wide.</td>
</tr>
<tr>
<td>Only First Word</td>
<td>Mark this box if you want only the first word of the data, such as the author’s last name, to appear on the label.</td>
</tr>
<tr>
<td>All Caps</td>
<td>Mark this box if you want the label information to appear in all capital letters.</td>
</tr>
<tr>
<td>Center</td>
<td>Mark this box if you want the information centered on the label.</td>
</tr>
</tbody>
</table>

4  Save your changes.
5  Repeat this task for each additional part your label.
Examples of Label Contents Setup

This example illustrates how to set up contents for a cataloging spine label:

Figure 2.7: Cataloging Spine Label
This example illustrates how to set up a circulation label for a serials issue:

**Figure 2.8: Serial Label Contents Setup**

- **Title**: Psychology
- **Call#: 449**
- **Loc**: Amherst Library
- **Subscr#: 27**
Labels

Specifying Spine Breaker Categories

If you want to use spine labels, you need to set up spine breaker categories. Spine breaker categories determine the way call numbers print on spine labels. When a call number will not fit on a single line of a label, the spine breaker category determines where the numbers will be divided and wrapped to the next line.

You can implement spine breakers in two different ways:

- **Automatic call number division.** In the Edit Call Number Type view, you can specify the spine breaker method you want to use for the selected call number type. Then, when you print spine labels, Horizon automatically divides and wraps call numbers that are longer than the width of the label.

- **Spine breaker override.** Staff can enter special characters directly into a record’s call number field to override the automatic call number division and force the division of the call number on a printed spine label. These are the valid characters: question mark ( ? ), back slash ( \\( \) ), and pipe ( | ).

  **NOTE**

  Horizon does not allow the forward slash ( / ) for spine breaker override. There is a conflict between the use of this character as a spine breaker and the sudoc format.

The automatic spine breaker categories are predefined according to call number type. This task explains how to change the spine breaker category assigned to a given call number type. The predefined methods (called procedures) are stored in the mqmr73.dll file.

**Before You Begin**

If you need help in changing the procedures or DLLs assigned to a spine breaker category, contact your system implementor or Customer Support.

**To specify spine breaker categories**

1. Open the spine_breaker view in the Table Editor. Horizon displays the List Spine Breaker window.

2. Choose the spine breaker category you want to change, or create a new spine breaker category.
Horizon displays the Edit Spine Breaker window:

3 Complete these fields to specify a spine breaker category:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Enter this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spine Breaker</td>
<td>Enter the code that identifies the spine breaker category.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the spine breaker category.</td>
</tr>
<tr>
<td>DLL Name</td>
<td>Enter the DLL name that controls the spine breaker.</td>
</tr>
<tr>
<td>Procedure Name</td>
<td>Enter the procedure name that controls the spine breaker.</td>
</tr>
</tbody>
</table>

4 Save your changes.
Setting Up Spine Label Exporting

You can specify that Horizon exports all of your cataloging labels (such as spine or card labels) to a file. (For example, you might choose to export individual labels or a batch of labels to a file so you can later print those labels on a laser printer. This may be helpful if you do not have a spine label printer.) This lets you export label contents at the time you catalog several items, so that you can later print labels for those items at any time on a sheet of label stickers. This also lets you modify the content, format, and font of labels once you have exported them to a file.

If you choose to export labels to a file, you must use an HTML template for the content of the labels to be stored in. Each label set with labels that you want to export must have a template file. SirsiDynix provides default label template files for three of the default label sets that come with your Horizon system (cat2X2, catlab, and ser2X2). The layout of these template files must exactly match the label sticker sheet on which you print your labels. In this template file, you specify cells and tables to hold the content (such as title, author, and call number) of the labels. In this template, you control the dimensions, font, format, color, and so forth of each label in the label set.

This section explains these topics:

- Understanding Label Template Files
- Specifying Label Export Parameters
- Mapping the Label Template to a Label Set
- Assigning Template Codes to Dimensions of a Label

Understanding Label Template Files

A template file is an HTML file with tables and cells that holds the content of one label set. Cells in the template file also contain template codes that correspond to codes for each dimension of your labels. Horizon uses these codes to identify the content to put into the cells in the template file. SirsiDynix provides default label template files for three of the default label sets that come with your Horizon system (cat2X2, catlab, and ser2X2). You can use the default label template files that come with Horizon and modify them, as necessary, for your specific label sets. Or, you can set up label template files from scratch to match your specific label sets.

This section explains these topics:

- Using the Default Template Files
- Setting Up a Label Template File from Scratch

Using the Default Template Files

SirsiDynix provides three default template files for three of the default label sets that come with Horizon (cat2X2, catlab, and ser2X2). Each template is a pre-formatted HTML file with tables and cells that store the content of one label set. Cells in the template file also contain pre-defined template codes. Horizon uses these codes to identify the content to put into the cells in the template file. You need to make sure the pre-defined codes in the template files correspond to the codes that you have assigned to label dimensions for the label set in the label_content view.

This section includes these topics:

- Using the Default cat2X2 Template File
- Using the Default catlab Template File
- Using the Default ser2X2 Template File
To use the default cat2X2 template file

1. From your Horizon installation CD, copy and paste the t_cat2X2.htm template file to your hard drive.

2. Create a directory to store this template file on your local workstation.
   You should keep this directory local on one Horizon workstation at your library. This can be the workstation where you do most of your cataloging. Make note of this template file directory for a later task.

3. Open the label_content view in the Table Editor.
   Horizon displays the List Label Content Definition window:

Each dimension of cat2X2 label set displays as rows in this list window. Label one of cat2X2 has three dimensions; label two has seven dimensions; label three has four dimensions.

4. Use this table to match the code values for all dimensions of the first label in the set to those values in the template file that you copied in step 1:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Value you enter in the Code in Template field</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>11</td>
</tr>
<tr>
<td>Second</td>
<td>12</td>
</tr>
<tr>
<td>Third</td>
<td>13</td>
</tr>
</tbody>
</table>

5. Use this table to match the code values for all dimensions of the second label in the set to those values in the template file that you copied in step 1:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Value you enter in the Code in Template field</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>211</td>
</tr>
<tr>
<td>Second</td>
<td>212</td>
</tr>
</tbody>
</table>
Labels

6 Use this table to match the code values for all dimensions of the third label in the set to those values in the template file that you copied in step 1:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Value you enter in the Code in Template field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Third</td>
<td>213</td>
</tr>
<tr>
<td>Fourth</td>
<td>22</td>
</tr>
<tr>
<td>Fifth</td>
<td>23</td>
</tr>
<tr>
<td>Sixth</td>
<td>241</td>
</tr>
<tr>
<td>Seventh</td>
<td>242</td>
</tr>
</tbody>
</table>

7 Save your changes.

You must do these additional tasks to be able to export labels for the cat2X2 label set:

- “Specifying Label Export Parameters” on page 2-90
- “Mapping the Label Template to a Label Set” on page 2-91

To use the default catlab template file

1 From your Horizon installation CD, copy and paste the t_catlab.htm template file to your hard drive.

2 Create a directory to store this template file on your local workstation.

   You should keep this directory local on one Horizon workstation at your library. This can be the workstation where you do most of your cataloging. Make note of this template file directory for a later task.

3 Open the label_content view in the Table Editor.
Horizon displays the List Label Content Definition window:

Each dimension of the Catlab label set displays as a row in this list window. Label one of Catlab has three dimensions; label two has four dimensions; label three has one dimension.

4 Use this table to match the code values for all dimensions of the first label in the set to those values in the template file that you copied in step 1:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Value you enter in the Code in Template field</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>11</td>
</tr>
<tr>
<td>Second</td>
<td>12</td>
</tr>
<tr>
<td>Third</td>
<td>13</td>
</tr>
</tbody>
</table>

5 Use this table to match the code values for all dimensions of the second label in the set to those values in the template file that you copied in step 1:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Value you enter in the Code in Template field</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>21</td>
</tr>
<tr>
<td>Second</td>
<td>22</td>
</tr>
<tr>
<td>Third</td>
<td>23</td>
</tr>
<tr>
<td>Fourth</td>
<td>24</td>
</tr>
</tbody>
</table>
6. Use this table to match the code values for all dimensions of the third label in the set to those values in the template file that you copied in step 1:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Value you enter in the Code in Template field</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>31</td>
</tr>
</tbody>
</table>

7. Save your changes.
You must do these additional tasks to be able to export labels for the Catlab label set:
- “Specifying Label Export Parameters” on page 2-90
- “Mapping the Label Template to a Label Set” on page 2-91

To use the default ser2X2 template file

1. From your Horizon installation CD, copy and paste the t_ser2X2.htm template file to your hard drive.
2. Create a directory to store this template file on your local workstation.
You should keep this directory local on one Horizon workstation at your library. This can be the workstation where you do most of your cataloging. Make note of this template file directory for a later task.
3. Open the label_content view in the Table Editor.
Horizon displays the List Label Content Definition window:

Each dimension of the ser2X2 label set displays as a row in this list window. Label one of ser2X2 has three dimensions; label two has five dimensions; label three has three dimensions.
4 Use this table to match the code values for all dimensions of the first label in the set to those values in the template file that you copied in step 1:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Value you enter in the Code in Template field</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>11</td>
</tr>
<tr>
<td>Second</td>
<td>12</td>
</tr>
<tr>
<td>Third</td>
<td>13</td>
</tr>
</tbody>
</table>

5 Use this table to match the code values for all dimensions of the second label in the set to those values in the template file that you copied in step 1:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Value you enter in the Code in Template field</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>21</td>
</tr>
<tr>
<td>Second</td>
<td>22</td>
</tr>
<tr>
<td>Third</td>
<td>23</td>
</tr>
<tr>
<td>Fourth</td>
<td>24</td>
</tr>
<tr>
<td>Fifth</td>
<td>25</td>
</tr>
</tbody>
</table>

6 Use this table to match the code values for all dimensions of the third label in the set to those values in the template file that you copied in step 1:

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Value you enter in the Code in Template field</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>31</td>
</tr>
<tr>
<td>Second</td>
<td>32</td>
</tr>
<tr>
<td>Third</td>
<td>33</td>
</tr>
</tbody>
</table>

7 Save your changes.

You must do these additional tasks to be able to export labels for the ser2X2 label set:

- “Specifying Label Export Parameters” on page 2-90
- “Mapping the Label Template to a Label Set” on page 2-91

**Setting Up a Label Template File from Scratch**

Creating a label template file from scratch is the most complex part of setting up label exporting. This task requires that you have your label sticker pages ready so that you can plan out the dimensions (lines, columns, and spacing) in each template file.

You can choose to design the tables and cells in the label template file in Microsoft Word or any HTML design tool. After you create the template file, you need to save the file with an .htm or .html extension.
You need to also review the label sticker sheet you use for each label set. Label sticker sheets differ from each other. (For example, you may have one sticker sheet that has fifty labels with all of the same dimensions, arranged in rows of five labels by ten labels. Or, you may have a sticker sheet with ten label sets with different dimensions [including a spine label and circulation label in each set].)

**To create a label template file from scratch**

1. Using your label sticker sheet, figure out how many labels you need across and down in your label template file.
2. Start Microsoft Word or any HTML design tool.
3. Create a table with rows and columns that correspond to the labels on your label sticker sheet.
   
   For example, if your label sticker sheet has five labels across the sheet and five labels down the sheet, you create a table with five rows and five columns.
4. Above the table you just created, create another table with the number of rows and columns that you are mapping to the label set definition.
   
   To create the correct format, you may need to merge rows or columns so that the table exactly corresponds to the printout format of the label itself. Later, you fit this table into each cell in the table that you created in step 3.
5. In each cell of the table that you created in step 4, fill in a template code within double brackets “[[ ]]” for each dimension of the label.
   
   This template code is a unique string value that corresponds to each label’s dimension. (For example, you might assign a value of “[[11]]” for the first label, first line of the label set. Or, you would assign a value of “[[211]]” for the second label, first line, first column of the label in the set.) The code within the table you created in step 3 must be unique from all codes you define.
   
   Horizon uses this value to make the value distinct from the rest of the generated template file.
   
   You need to make sure that you enter the same value for the dimension in the label_content view. (For more information, see “Assigning Template Codes to Dimensions of a Label” on page 2-92.)
6. Save your changes.
7. Copy the table that you created in steps 4 through 6 into each cell of the table that you created in step 3.
8. Delete the table that you created in step 3 from the template file.
9. Repeat steps 4 through 8 for each label in your label set.
10. Save the file with an .htm or .html extension.
11. Save the HTML file as Unicode.

   This ensures that all unicode characters display on the label correctly.

**IMPORTANT**

If you have difficulty modifying the dimensions of the default label template files to correspond to your labels, contact Customer Support.

You must do these additional tasks to be able to export labels for the template that you created for your label set:
Specifying Label Export Parameters

Label export parameters include specifying whether the labels are exported or printed, the name of the template for your labels, the prefix that you want Horizon to add to the template file, if you want to preview the exported file, and so forth. You set up export parameters in the label_export view in the Table Editor.

To specify label export parameters

1. Open the label_export view in the Table Editor.
   Horizon displays the List Label Export window.
2. Click New.
   Horizon displays the Edit Label Export window:

![Edit Label Export Window]

3. Complete these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the export. This name displays as an option on the Code Lookup window before you export labels. This window lets you choose to print labels or export labels to a file.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description that can help you identify the type of export.</td>
</tr>
<tr>
<td>Export to a printer?</td>
<td>Mark this if you want to specify this export sends the label to a printer rather than a file.</td>
</tr>
</tbody>
</table>
Labels

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Append to the file?</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark this box if you want to append the export of labels to an existing label template file.</td>
</tr>
<tr>
<td></td>
<td>• Leave this box unmarked if you want to export the labels to a new label template file.</td>
</tr>
<tr>
<td></td>
<td>If the file exists, Horizon prompts you to append to an existing file or create a new one. You can choose to delete the export label file before you start the export.</td>
</tr>
<tr>
<td>Preview the export?</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark this box if you want Horizon to display a window to preview the contents of the label before you export.</td>
</tr>
<tr>
<td></td>
<td>• Leave this box unmarked if you want to export a label without viewing the contents beforehand.</td>
</tr>
<tr>
<td>File Path</td>
<td>Enter the path to your template files.</td>
</tr>
<tr>
<td></td>
<td>(For example, enter “C:\SpineLabels”.</td>
</tr>
<tr>
<td>File Name Prefix</td>
<td>Enter a prefix to help staff identify the exported label files as unique.</td>
</tr>
<tr>
<td></td>
<td>You might have spine labels in one export from different collections. These collections may be defined by different label sets.</td>
</tr>
<tr>
<td></td>
<td>If you enter a prefix here, Horizon exports labels of different formats in one batch into the corresponding physical files. These files have the file name prefix you specify.</td>
</tr>
<tr>
<td>Note</td>
<td>Enter any notes to staff about exporting labels.</td>
</tr>
<tr>
<td></td>
<td>This note displays in the Code Lookup Label Export window.</td>
</tr>
</tbody>
</table>

4  Save your changes.

**Mapping the Label Template to a Label Set**

Each label set in Horizon must be assigned a single HTML template file. You do this in the label_set_definition view.

**To map the label template to a label set**

1  Open the label view in the Table Editor.
   Horizon displays the List Label-set Definition window.
2  Double-click the label set that you want to map to a label template file.
Chapter 2: General Setup

Horizon displays the Edit Label-set Definition window:

![Edit Label-set Definition Window](image)

3. In the **Template File Name** field, enter the path and template file name you created for this label set.
   
   This is the path to the directory you created for the label template files in a previous task. You **must** also include the template file name that you want this label set to use.

4. Save your changes.

**Assigning Template Codes to Dimensions of a Label**

If you created your label template file from scratch, you need to assign a template code to each dimension of a label in a label set. A template code is a string value that corresponds to each part of a label in a label set. (For example, you might assign a value of “11” to the first label dimension, first line of the label set. Or, you would assign a value of “211” to the second label dimension, first line, first column of the label in the set.) You should use a pattern that helps you identify the part of the label to which the code corresponds.

Horizon uses this value to make the value distinct from the rest of the generated template file. You need to enter the value for each part of a label in the label_content view and make sure the same value is in each cell of the template file. (For more information, see “Using the Default Template Files” on page 2-83.)

**To assign template codes to dimensions of a label**

1. Open the **label_content** view in the Table Editor.
   
   Horizon displays the List Label Content Definition window.

2. Double-click the part of the label to which you want to assign a code.
Horizon displays the Edit Label Content Definition window:

3. In the **Code in Template File** field, enter the code for this part of the label. (For example, enter “100” to represent label 1, line 0, column 0.)

4. Save your changes.

5. Repeat steps 2 through 4 for each part of the label to which you want to assign a code.

**MARC Maps**

A MARC map is a systematic method for extracting library information stored in MARC records. It is a “map” to the tags and subfields in a MARC record. This “map” makes it easy for Horizon to retrieve MARC information—much like a map helps you find a geographic destination. In addition, a MARC map controls under what conditions Horizon retrieves and displays MARC data.

MARC maps are used by many fundamental processes in Horizon because you need to index, search for, and display MARC information throughout your entire Horizon system. Because MARC maps touch so many fundamental functions in Horizon, the setup of a MARC map can be a bit complex. Regardless of how you use MARC maps, you use the same logic, steps, and pattern to create each MARC map. Once you understand how to create one, you can better understand how each MARC map actually extracts the MARC data.

Each MARC map serves a specific purpose. You set up a single MARC map to extract data by specifying which tags and subfields you want Horizon to index, display, limit by, or use for bib record linking. A MARC map can extract data from a single tag or multiple tags. (For example, you can create a MARC map to extract just the main title [tag 245] for display purposes, or you can create a MARC map to extract various title tags [245, 246, 740, 780] for indexing and searching purposes.) An extraction tag is the tag you want the MARC map to “extract” or get data from.

Horizon uses MARC maps to retrieve MARC record information for these four reasons:

- **To index records.** Horizon uses “Indexing MARC maps” to extract MARC data from specified tags and subfields and puts this data into an index table on the database. Then, when staff or users do a search, Horizon searches the index table for the MARC information.
To display MARC record information in Horizon windows. Horizon uses “Display MARC maps” to display MARC information in PAC results lists and other Horizon windows that display MARC information. (For example, when staff or borrowers search for and display a title in the Bibliographic Detail window in staff searching, Horizon uses the MARC map to “know” what MARC information to display in the window. This is because you can assign a MARC map to views that display in staff searching.)

To limit searching based on MARC data. Horizon uses “Limiting MARC maps” to limit a list of matches during searching. Staff or borrowers can “weed out” unwanted matches in a keyword search after they have started the search. (For example, if you do a title keyword search for the word “computers,” several titles may be listed. If you want only the latest information on computers, you can limit the search date by choosing “publication date” as the field option, selecting “greater than” as the limiting operator, and entering “2001” as the limiting value. Horizon regenerates the list, showing only those titles published after 2001.)

To define link tags. Horizon uses “Linking MARC maps” to control linking of bibliographic records during import. When staff imports bib records, Horizon uses a Linking MARC map along with other parameters as defined in the Import Source to determine what tags and subfields to use as match points. This process determines if your library already has an existing title in the database.

This section describes how to set up MARC maps for these four purposes. In addition, this section explains the default MARC maps that come with the Horizon system.

This section explains these topics:

- Default MARC Maps
- Understanding Conditional Parts of a MARC Map
- Understanding Indexing MARC Maps
- Understanding Display MARC Maps
- Understanding Limiting MARC Maps
- Understanding Linking MARC Maps
- Changing or Creating a MARC Map

Default MARC Maps

Horizon comes with a variety of default MARC maps. Each MARC map is part of a set. Each set has a prefix as part of its code to identify the type of set the MARC map belongs to. Horizon uses these prefixes as a naming convention to help you identify the purpose for each MARC map. You can use the default MARC maps that come with Horizon, or you can create new or change existing MARC maps to suit your library’s needs.
This table identifies some of the more common code prefixes used to identify these sets:

### Table 2-1: Default MARC Map Code Prefixes

<table>
<thead>
<tr>
<th>MARC Map Code Prefix</th>
<th>Type of MARC Maps within the Set</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>Bib-based indexing</td>
<td>Sjtitle - Journal/Newspaper Title</td>
</tr>
<tr>
<td>X</td>
<td>Auth-based indexing</td>
<td>Xauthor - Author</td>
</tr>
<tr>
<td>T</td>
<td>76x-78x tags</td>
<td>Tag760 - Subseries</td>
</tr>
<tr>
<td>Z</td>
<td>Multi-source indexing</td>
<td>Zutil - Uniform titles (author)</td>
</tr>
<tr>
<td>N</td>
<td>Non-indexing</td>
<td>Ntitle - Title (not indexed)</td>
</tr>
<tr>
<td>D</td>
<td>Display MARC maps</td>
<td>Dauthor - Author</td>
</tr>
<tr>
<td>L</td>
<td>Limit maps</td>
<td>Lcatso - Cataloging Source</td>
</tr>
<tr>
<td>LZ</td>
<td>Limit by fixed field</td>
<td>LZMUco - Music - Form of composition</td>
</tr>
<tr>
<td>lnk</td>
<td>Linking MARC maps</td>
<td>lnkmatw - Record control number</td>
</tr>
<tr>
<td>M</td>
<td>MARC display in staff searching</td>
<td>M880 - staff searching display of the 880 tag</td>
</tr>
</tbody>
</table>

**IMPORTANT**

You should maintain at least three sets of MARC maps: one for indexing, one for search limiting, and one for display purposes. In addition, you can maintain an additional set for linking if you want to link bib records during import.

You should change existing indexing MARC maps (maps that start with the letter S, X, or Z) with extreme caution and only if you have a thorough knowledge of MARC maps and Horizon indexes—doing so changes the way Horizon indexes records. After you change a MARC map, you must rebuild any index that uses that MARC map. If you have concerns, contact Customer Support to help you change Indexing MARC maps.
Understanding Conditional Parts of a MARC Map

In many MARC maps, you may not want to extract the data from tags in a MARC record unless those tags contain certain values. In this case, you can make conditions on the MARC map. Conditions are specific values that must be in the MARC record in order for Horizon to actually extract the data from the record. (For example, you may not want the MARC map to extract data from a specific tag unless another subfield or position in the same MARC record contains a specific value.)

You use special syntax (including particular punctuation marks) to set up these conditions as you create your MARC map. This syntax “tells” Horizon the subfield or position in the tag that must contain a specific value, and the value that subfield or position must contain. It is this syntax that makes the conditional parts of a MARC map so powerful and flexible.

You use conditions in MARC maps in two specific ways. First, you can specify conditions for a specific extraction tag in the MARC record. Second, you can specify conditions that apply to the entire MARC map.

This section explains these topics:

- Specifying Conditions on an Extraction Tag
- Specifying Conditions for the Entire MARC Map
- Conditional MARC Map Syntax
- Example of a MARC Map with Conditionals

Specifying Conditions on an Extraction Tag

You can specify a condition to any of the extraction tags that you set up in a MARC map. (An extraction tag is the tag you want the MARC map to “find” and extract data from.)

For example, you can set your Display MARC map to extract and display additional title data from the 210, 212, 222, 246, and 740 tags, but to extract and index data in the 246 tag only if indicator 2 of tag 246 has specific values. In this case, the MARC map will still index the other tags you set up as extraction tags regardless of the values in those tags. Here is an example of this MARC map setup:

<table>
<thead>
<tr>
<th>MARC Map</th>
<th>Extraction tags and subfields</th>
<th>Conditions on extraction tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dadtitl</td>
<td>210 a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>212 a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>222 ab</td>
<td></td>
</tr>
<tr>
<td></td>
<td>246 abhnp</td>
<td>Extract data in 246 tag only if indicator 2 has a value of 0 through 3.</td>
</tr>
<tr>
<td></td>
<td>740 ahnp</td>
<td></td>
</tr>
</tbody>
</table>

Specifying Conditions for the Entire MARC Map

You can create conditions that apply to the entire MARC map. In this case, the conditions are more complex and control whether the MARC map will use any of the extraction tags as it finds and extracts MARC data; in other words, conditions of this type apply to all the data the MARC map extracts. If the MARC record does not meet the conditions, then Horizon skips (does not index or use) it.
For example, if you are creating a MARC map to extract uniform title authority tags, you would set up the extraction tags to extract data from main heading tags on the authority record (tags 100, 110, 111, 130) only if the authority record is valid for use as a main or added entry. In this case, you would set up a condition to extract the information for all tags only if position 14 of the 008 tag contains a value of “a”. (This value means the record is a valid authority.) If position 14 of the 008 tag contains a value other than “a”, the MARC map will not extract any of the data in the authority record. Here is an example of this MARC map setup:

### Conditional MARC Map Syntax

You create the conditional parts of a MARC map using specific syntax. It is this syntax that makes the conditional parts of a MARC map so powerful and flexible. You use the same syntax if you are creating conditions on the extraction tags or conditions for the entire MARC map. (For example, when you create tag parts in conditional statements, Horizon uses an asterisk [ * ] for tag indicators and slashes [ / ] to identify positions within tags.)

This table explains the syntax you use to create conditional parts of a MARC map:

<table>
<thead>
<tr>
<th>To enter this</th>
<th>Enter this type of information</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>position</td>
<td>position number</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(position 8)</td>
</tr>
</tbody>
</table>
Here are some examples of conditional entries:

<table>
<thead>
<tr>
<th>To say this</th>
<th>Enter this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicator 1</td>
<td>*1</td>
</tr>
<tr>
<td>Position 14</td>
<td>/14</td>
</tr>
<tr>
<td>Position 14 for a length of 2 positions (Positions 14 and 15)</td>
<td>/14.2</td>
</tr>
<tr>
<td>Subfields $a, b, c, x, y, z, and 2$</td>
<td>abcxyz2</td>
</tr>
<tr>
<td>Position 3 of subfield $w$ for two positions (positions 3 and 4)</td>
<td>w/3.2</td>
</tr>
<tr>
<td>Subfields $a, b$, part of $x$ (positions 6 and 7 of $x$), and $z$</td>
<td>abx/6.2,z</td>
</tr>
</tbody>
</table>

**Example of a MARC Map with Conditionals**

Suppose you need to set up a conditional MARC map that displays a record’s International Standard Music Number (ISMN) if it has one. If a record has another kind of standard recording number, such as a product code for sound, that code will not display, even though it is stored in the same tag and subfield as the ISMN.
For example, suppose you have these two records:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Owned by: Unowned</td>
<td>Field: Type of standard number or code</td>
<td></td>
</tr>
<tr>
<td>000</td>
<td>c j m _ 1 e _</td>
<td></td>
</tr>
<tr>
<td>001</td>
<td>04756681 / R</td>
<td></td>
</tr>
<tr>
<td>007</td>
<td>s d b s m e n m p l u _</td>
<td></td>
</tr>
<tr>
<td>008</td>
<td>040404 s 1975 ___ no lat _</td>
<td></td>
</tr>
<tr>
<td>010</td>
<td>Ta 84755661 / R</td>
<td></td>
</tr>
<tr>
<td>024</td>
<td>2 Ta 564953</td>
<td></td>
</tr>
<tr>
<td>028</td>
<td>0 2 Ta 6607 047 Ib Philips</td>
<td></td>
</tr>
<tr>
<td>040</td>
<td>Id UPRA</td>
<td></td>
</tr>
<tr>
<td>041</td>
<td>0 Ta violin</td>
<td></td>
</tr>
<tr>
<td>045</td>
<td>2 1 Id d1944 Ib d1973</td>
<td></td>
</tr>
<tr>
<td>047</td>
<td>Ta ar Ta cl Ta ma</td>
<td></td>
</tr>
<tr>
<td>050</td>
<td>1 Ta M3.1</td>
<td></td>
</tr>
<tr>
<td>050</td>
<td>0 Ta Philips 6507 047</td>
<td></td>
</tr>
<tr>
<td>070</td>
<td>1 Ta Nielsen, Ludvig</td>
<td></td>
</tr>
<tr>
<td>240</td>
<td>1 0 Ta Selections</td>
<td></td>
</tr>
<tr>
<td>245</td>
<td>1 0 Ta Ludvig Nielsen, Ih [sound recording].</td>
<td></td>
</tr>
<tr>
<td>250</td>
<td>-- Ta Norway: Ib Philips, 1c 1975</td>
<td></td>
</tr>
<tr>
<td>330</td>
<td>-- Ta l sound disc: Ih 33 1/3 rpm: Ta c 12 in.</td>
<td></td>
</tr>
<tr>
<td>440</td>
<td>0 Ta Contemporary music from Norway</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status: ce</th>
<th>Created: 11/30/2001</th>
<th>Updated: 3/14/2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owned by: Unowned</td>
<td>Field: Standard recording code (Optional)</td>
<td></td>
</tr>
<tr>
<td>000</td>
<td>c j m _ 1 e _</td>
<td></td>
</tr>
<tr>
<td>001</td>
<td>Is 04527957</td>
<td></td>
</tr>
<tr>
<td>007</td>
<td>s d b s m e n m p l u _</td>
<td></td>
</tr>
<tr>
<td>008</td>
<td>006821 s 1985 ___ no lat _</td>
<td></td>
</tr>
<tr>
<td>040</td>
<td>Id UPRA</td>
<td></td>
</tr>
<tr>
<td>044</td>
<td>0 Ta 564953</td>
<td></td>
</tr>
<tr>
<td>245</td>
<td>0 0 Ta Amadeus, Ih [sound recording]: Ta More music from the original soundtrack of the film Amadeus</td>
<td></td>
</tr>
<tr>
<td>246</td>
<td>3 0 Ta Amadeus vol 2</td>
<td></td>
</tr>
<tr>
<td>250</td>
<td>-- Ta Berkeley, CA: Ta Fantasy Records, 1c 1985</td>
<td></td>
</tr>
<tr>
<td>330</td>
<td>-- Ta l sound disc: 53 min.; Ta c 33 1/3 rpm; Ta c 12 in.</td>
<td></td>
</tr>
<tr>
<td>500</td>
<td>-- Ta Title on spine: Amadeus original soundtrack recording vol 2</td>
<td></td>
</tr>
<tr>
<td>500</td>
<td>-- Ta Program notes by Grover Selas on container.</td>
<td></td>
</tr>
<tr>
<td>505</td>
<td>0 Ta The magic flute, overture, K. 620: Mozart -- The magic flute, Aria (no. 14), &quot;Queen of the night&quot;: Mozart -- Mozart -- Piano concerto in D minor, K. 466: 1st movement / Mozart -- Aria finale / Sellari -- Eine kleine Nachtmusik (Serenade), K. 525: 1st movement / Mozart -- Concerto for flute and harp, K. 293: 2nd movement / Mozart -- Six German dances (Nos. 1–3), K. 503: Mozart -- Concerto bene / Giordani -- The abduction from the seraglio, K. 384: Chorus of the Janissaries (arr.) / Mozart.</td>
<td></td>
</tr>
<tr>
<td>511</td>
<td>0 Ta Academy of St Martin-in-the-Fields; Sir Neville Marriner, conductor.</td>
<td></td>
</tr>
</tbody>
</table>

Both records have a 024 tag for the standard record number. The number for the title *Ludvig Nielsen* in the first record is an ISMN number, indicated by the value “2” stored in the first indicator position of the tag. The standard recording number for the title *Amadeus* in the second record is an international standard recording code, indicated by the value of “0” stored in the first indicator position of the tag.
Consequently, you want the ISMN number for *Ludvig Nielsen* to display in the Bibliographic Detail window, but you do not want the standard recording code for *Amadeus* displayed.

Formulated as a sentence, the condition for this setup is this:

Display information stored in tag 024, subfield *a*, if indicator 1 contains a value of 2.

When you set up the MARC map in Horizon, the extraction setup for this MARC map is this:

![Edit MARC Map window](image)

In addition, you can set up a condition for the entire MARC map to display serials that are either newspapers or journals.

Formulated as a sentence, two of the conditions for this setup are this:

Display the information in tag 245 (Title) if the information stored in position 21 of tag 008 (type of serial) contains a value of “n” (for newspaper) or “p” (for periodical), or if the information stored in position 04 of tag 006 (type of material) contains a value of “n” (for newspaper) or “p” (for periodical).
When you set up the MARC map in Horizon, the extraction setup for this MARC map is this:

When you set up the MARC map in Horizon, the conditional setup for this MARC map is this:

Understanding Indexing MARC Maps

You set up Indexing MARC maps to extract MARC data from specified tags and subfields so staff and borrowers can search for records in Horizon. Indexing MARC maps put data from extraction tags into an index table on the database. Then, when staff or users do a search, Horizon searches the index table for the MARC information. Many Horizon indexes use Indexing MARC maps to extract MARC information. (Indexes that do not use MARC maps extract data directly from database tables.) For example, a title keyword search option in staff searching uses an index with a MARC map containing all title tags.
You can choose to create a new Indexing MARC map or change an existing one to meet your needs. If you want to create a new one, you can copy an existing one and make changes to the new one you create. Or, you can create a new one from scratch.

**Example of an Indexing MARC Map Setup**

This example shows an Indexing MARC map that extracts data from title tags:

<table>
<thead>
<tr>
<th>MARC Map</th>
<th>Extraction tags and subfields</th>
<th>Conditions on extraction tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stitle</td>
<td>245 abfghknps</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>210 a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>212 a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>222 ab</td>
<td></td>
</tr>
<tr>
<td></td>
<td>242 ab</td>
<td></td>
</tr>
<tr>
<td></td>
<td>246 abfhnp</td>
<td></td>
</tr>
<tr>
<td></td>
<td>247 abfhnp</td>
<td></td>
</tr>
<tr>
<td></td>
<td>740 ahnp</td>
<td></td>
</tr>
<tr>
<td></td>
<td>780 abdgkrst</td>
<td></td>
</tr>
<tr>
<td></td>
<td>785 abcdgkrst</td>
<td></td>
</tr>
</tbody>
</table>

**Understanding Display MARC Maps**

You set up Display MARC maps to extract information from MARC records and display it on bibliographic display windows, including those in PAC and Reserve Bookroom. Without the MARC map, Horizon does not “know” how to find the MARC information necessary to display.

There is generally one MARC map for each type of information displayed. (For example, when staff or users search for and display a title in the Bibliographic Detail window in staff searching, Horizon uses the MARC map to “know” what MARC information to display in the window.)

When you edit or create MARC maps used for displays, you specify the tags and subfields from which Horizon extracts information to display and the order in which Horizon displays them. The order you enter the tags determines the order that tag information is displayed in the window.
You can also control what part of or specific value in a fixed or variable MARC field will be displayed. (For example, you can set up the Bibliographic Detail window to display a title’s ISMN number only if it is a number and not a code.)

**NOTE**

Information Portal also uses Display MARC Maps you set up to display MARC information in screens. (For more information about using Display MARC maps to change the information on a search result display, see the Information Portal System Administrator’s Guide.)
Example of Display MARC Map Setup

This example shows a Display MARC map to display all subjects in full bib display:

<table>
<thead>
<tr>
<th>MARC Map</th>
<th>Extraction tags and subfields</th>
<th>Conditions on extraction tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dsubj</td>
<td>600 abcdedfghiklmnopqrstuvwxyz 610 abcdedfghiklnopqrstuvxyz 611 acdefghiklnopqrstuvxyz 630 adfghiklnopqrstuvxyz 650 abvxyz 651 avxyz 880 abcdedfghiklnopqrstuvxyz</td>
<td>Extract data in 880 tag only if positions 0 or 1 in subfield 6 have a value of 6.</td>
</tr>
</tbody>
</table>

Understanding Limiting MARC Maps

Search Limiting MARC maps let staff or borrowers narrow a list of search term matches as they search. They can use limiting to “weed out” unwanted matches in a keyword search after you have started the search. (For example, if you do a title keyword search for the word “computers,” Horizon lists several titles. If you want only the latest information on computers, you can limit the search date by choosing “publication date” as the field option, selecting “greater than” as the limiting operator, and entering “2001” as the limiting value. Horizon regenerates the list, showing only those titles published after 2001.)
When you set up search limiting options, staff searching displays these options in the Search Limit window when users click Limit from a Titles List window:

![Search Limit window](image)

These are the search limiting options that you define and that users can choose from. Horizon populates the Fields list from the MARC map description.

**NOTE**

Information Portal also uses Limiting MARC Maps to help limit your searching. (For more information about changing limiting options and the Limiting MARC maps that Information Portal uses, see the Information Portal System Administrator’s Guide.)

**Example of Limiting MARC Map Setup**

This example shows a Limiting MARC map to limit search results by publisher date:

<table>
<thead>
<tr>
<th>MARC Map</th>
<th>Extraction tags and subfields</th>
<th>Conditions on extraction tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update</td>
<td>260 (c)</td>
<td>None</td>
</tr>
</tbody>
</table>

**Understanding Linking MARC Maps**

Horizon uses Linking MARC maps to control linking of bibliographic records during import. When staff imports bib records, Horizon uses a Linking MARC map along with other parameters as defined in the Cataloging Import Source to determine what tags and subfields to use as match points. This process determines if your library already has an existing title in the database. (For more information on assigning a MARC map to an import source, see the “Setting Up Link Match Points” section in the “Setting Up Import Source Parameters” section of the Cataloging Setup Guide.)
### Example of Linking MARC Map Setup

This example shows a Linking MARC map that links 76x through 78x tags to an existing bib record:

<table>
<thead>
<tr>
<th>MARC Map</th>
<th>Extraction tags and subfields</th>
<th>Conditions on extraction tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inksubw</td>
<td>760 w 762 w 765 w 767 w 770 w 772 w 773 w 775 w 776 w 777 w 780 w 785 w 786 w 787 w</td>
<td>None</td>
</tr>
</tbody>
</table>

### Changing or Creating a MARC Map

You can set up MARC maps for indexing, display, limiting, or linking. This section explains how to set up each type of these MARC maps. (For more information on each type of MARC map, see “MARC Maps” on page 2-93.)
To change or create a MARC map

**View:** marc_map

**Process:** Administration\Index Control Menu\MARC Map Table

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marc_map Code</td>
<td>Enter the code that identifies the MARC map.</td>
</tr>
<tr>
<td></td>
<td><strong>IMPORTANT</strong></td>
</tr>
<tr>
<td></td>
<td>Use the prefix suggestions listed in the table “Default MARC Map Code Prefixes” on page 2-95 as a guide in naming your MARC maps.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the MARC map. (For example, you may name the MARC map “Stitle” if you are creating a MARC map to extract titles for keyword indexing.)</td>
</tr>
<tr>
<td>Search Limit?</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark this box if you are creating a search Limiting MARC map.</td>
</tr>
<tr>
<td></td>
<td>• Clear this box if you are creating an Indexing, Display, or Linking MARC map.</td>
</tr>
</tbody>
</table>
## Chapter 2: General Setup

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sort Filter</strong></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you do not want to filter the data this MARC map extracts, mark <strong>No Filter</strong>.</td>
</tr>
<tr>
<td></td>
<td>• If the data that this MARC map extracts is date information, such as publication dates, mark the <strong>Year (4 digits)</strong> option if you want Horizon to sort and display the year in four digits.</td>
</tr>
<tr>
<td></td>
<td>• If the data that this MARC map extracts is numeric information, mark the <strong>Numeric Value (decimal optional)</strong> option if you want Horizon to sort and display the numeric value.</td>
</tr>
<tr>
<td><strong>Run-on</strong></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want to display one line per tag, mark <strong>Do Not Run-on</strong> option.</td>
</tr>
<tr>
<td></td>
<td>Generally, you will want all types of MARC maps that you create to display one line per tag.</td>
</tr>
<tr>
<td></td>
<td>• If you want to display tags in MARC maps as a single string instead of one line per tag, mark <strong>Do Run-on</strong>.</td>
</tr>
<tr>
<td></td>
<td>(For example, if you want your Bibliographic Detail window in staff searching and PAC to display all additional titles as a run-on line instead of displaying one title per line, you can create a 7xx MARC map with Do Run-on marked.)</td>
</tr>
</tbody>
</table>

**NOTE**

The One Tag Only check box in the mq_index view specifies that only the result of the first tag is considered, so if the One Tag only box is marked, Horizon disregards the Run-on setting.
In this field | Do this
---|---
Tag | Enter the tag that you want the MARC map to extract information from.
(For example, if you are creating an Indexing MARC map to extract author information, you would enter “100” as the tag.)
Part | Enter the subfields or fixed field positions of the tag that you want the MARC map to extract information from.
(For example, if you are creating an Indexing MARC map to extract author information, you may enter “abcdfgklmnopqrst”.)
Conditional Part | Enter which part (subfield or fixed field position) must contain the conditional value in order for Horizon to extract the MARC information, *only* if you want to set a condition on the tag you are extracting.
NOTE: Entering conditions requires that you specify characters, such as the slash (/) before a position, and so forth. (For a list of conditional characters, see “Conditional MARC Map Syntax” on page 2-97. For an example of how a conditional character can be used, see “Example of a Conditional MARC Map” on page 2-98.)
Conditional Value | Enter the value that the conditional part (subfield or fixed field position) must contain in order for Horizon to extract the MARC information, *only* if you want to set a condition on the tag you are extracting.

For more information on completing this Extraction group, see “Understanding Conditional Parts of a MARC Map” on page 2-96.
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Tag: Prefix</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want a constant string of characters to display before the first displayed tag, enter the string in this field.</td>
</tr>
<tr>
<td></td>
<td>Typically, you would only want to display a prefix if you are setting up a Display MARC map.</td>
</tr>
<tr>
<td></td>
<td>• If you do not want a string of characters to display before the first tag, leave this field empty.</td>
</tr>
<tr>
<td>First Tag: Suffix</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want a constant string of characters to display after the first displayed tag, enter the string in this field.</td>
</tr>
<tr>
<td></td>
<td>Typically, you would only want to display a suffix if you are setting up a Display MARC map.</td>
</tr>
<tr>
<td></td>
<td>• If you do not want a string of characters to display after the first tag, leave this field empty.</td>
</tr>
<tr>
<td>Other Tags: Prefix</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want a constant string of characters to display as a prefix before other displayed tags, enter the string in this field.</td>
</tr>
<tr>
<td></td>
<td>Typically, you would only want to display a prefix for other tags if you are setting up a Display MARC map.</td>
</tr>
<tr>
<td></td>
<td>• If you do not want a string of characters to display as a prefix before other tags, leave this field empty.</td>
</tr>
<tr>
<td>Other Tags: Suffix</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want a constant string of characters to display as a suffix after other displayed tags, enter the string in this field.</td>
</tr>
<tr>
<td></td>
<td>Typically, you would only want to display a suffix for other tags if you are setting up a Display MARC map.</td>
</tr>
<tr>
<td></td>
<td>• If you do not want a string of characters to display as a suffix after other tags, leave this field empty.</td>
</tr>
<tr>
<td>HTML Format (Info Portal only)</td>
<td>If the Display MARC map that you are setting up is for setting up linking tags that display URLs or other information in Information Portal, such as the 856 tag, enter the format for the link in this field.</td>
</tr>
<tr>
<td></td>
<td>(For more information on setting up Information Portal to use 856 tags [Linkable Tags], see the Information Portal System Administrator’s Guide.)</td>
</tr>
</tbody>
</table>
Distinct Subfields

Do one of these options:

- If you want Horizon to treat each subfield in the extraction tag you are setting up as a separate entry in the index or as a separate line in your display, mark this box.

This option is specifically for Indexing and Display MARC maps. (For example, this feature lets you make full use of the enhanced content notes in the 505 tag.)

**NOTE**

If you mark this option, you **must** make sure the Do Not Run-on option is also marked for this MARC map.

- If you want Horizon to treat all subfields as one entry, clear this box.

For more information on completing this Conditional group, see “Understanding Conditional Parts of a MARC Map” on page 2-96.

In this field in the Conditional group

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opening Paren.</td>
<td>If you are grouping several conditions in this MARC map together, enter a left parenthetical mark in the first entry for the group.</td>
</tr>
<tr>
<td>Tag</td>
<td>Enter the tag that you are setting up as the conditional tag. (For example, if you are creating an Indexing MARC map to extract a main or added entry tag, but only if position 14 of the 008 contains a value of “a”, you would enter “008” as the tag.)</td>
</tr>
</tbody>
</table>
Right-to-Left Language Display

If you use Windows 2000 or Windows XP, you can correctly view and edit records whose information is in a language that reads from right to left (for example, Arabic or Hebrew). You can also have Horizon display the MARC Editor from right to left. This means that the tags can display on the right side of the record.

You install languages for the client during the installation process. You need to install the right-to-left language on each workstation where you want Horizon to display from right to left. (For more information, call SirsiDynix Customer Support.) You add languages for the database from within Horizon.

<table>
<thead>
<tr>
<th>In this field in the Conditional group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part</td>
<td>Enter the subfields or positions of the conditional tag you want the MARC map to extract information from. (For example, if you are creating an Indexing MARC map to extract a main or added entry tag, but only if position 14 of the 008 tag contains a value of “a”, you would enter “/14” as the part.)</td>
</tr>
<tr>
<td>Value</td>
<td>Enter the value that the conditional part (subfield or position) must contain in order for Horizon to extract any of the MARC information specified for the entire MARC map.</td>
</tr>
<tr>
<td>Closing Paren.</td>
<td>If you are grouping several conditions in this MARC map together, enter a right parenthetical mark in the last entry for the group of conditions.</td>
</tr>
</tbody>
</table>
| Operator                              | If you are creating several conditions in this MARC map and you want to use operators to relate the conditions together, do one of these options:  
  - Mark None if you are setting up only one condition on this MARC map.  
  - Mark AND if you are setting up multiple conditions on this MARC map and want to require that all the conditions must be met in order for the MARC map to extract any data from the extraction tags.  
  - Mark OR if you are setting up multiple conditions on this MARC map and want to require that only one of the conditions must be met in order for the MARC map to extract any data from the extraction tags. |
Adding right-to-left language support to the database lets MARC Editor labels and messages display from right to left. Adding right-to-left language support to the client lets the MARC Editor itself display from right to left:

After you set up this feature, if library staff log in to Horizon and use the Options button to choose a language that reads from right to left, Horizon automatically displays with that orientation until library staff log off and log in again with a different language choice.

You can also start Horizon with a command line that specifies the language you want to use. This lets the Horizon login screen display in the chosen language.

For example, if you wanted Horizon to display in Saudi Arabia’s version of Arabic, you could enter this command at the command line prompt:

Launcher.exe/nara

The /n is the switch specifying the command line option for the language resource to be loaded and “ara” is the abbreviated Windows language code for Arabic (Saudi Arabia).

IMPORTANT
A Horizon stand-alone product that has a language component can use the right-to-left layout if you start it from the Horizon Launcher after you have logged in and chosen the right-to-left language. You can also start the stand-alone product with the /n switch to change the layout to right-to-left.

Before You Begin
Find the official three-letter Microsoft language code for the language that you want to use in Horizon. (For example, the code for Saudi Arabia’s version of Arabic is “ara”.)
Chapter 2: General Setup

For a complete list of languages and their codes, see this web site:
msdn.microsoft.com

Use the web site’s search tool to search for “Language Code and Scripts”. Include the quotes (""") in your search.

To set up a right-to-left language display

**Process:** Administration\System Setup\Interface Language

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>Enter the number following the highest order number from the list. (For example, if the highest order number is 3, enter “4”.) The highest order number is shown on the List Interfaces Languages window.</td>
</tr>
<tr>
<td>Language Code</td>
<td>Enter the three-letter Microsoft code for the language you are setting up.</td>
</tr>
<tr>
<td>Language Name</td>
<td>Enter the language name.</td>
</tr>
<tr>
<td>3M language code</td>
<td>If you use a 3M product, you may need to enter the 3M language code.</td>
</tr>
</tbody>
</table>
Displaying the Horizon Launcher from Right to Left

If you want the Horizon Launcher to always start as a right-to-left display for languages that display right to left, you can set up Horizon to do so.

To display the Horizon Launcher from right to left

1. If you do not already have a shortcut to the Horizon launcher either on your desktop or in another location, create one.
2. Right-click on the Horizon Launcher shortcut and choose Properties.
3. At the end of all of the text in the Target field, enter a space and the “/r” switch. (For example, enter “ /r”.)
4. Click OK.

Euro Converter

On January 1st, 1999, the European currency called the “euro” was introduced. This gives people the ability to conduct business in either their national currency or in the euro. Libraries need the ability to convert fines or fees assessed in Circulation from their national currencies into the “euro” equivalent should the borrower want to pay their fines or fees in euros. A borrower may also want to pay their fines or fees in a currency other than the national currency of the library or in euros. Horizon includes a “currency” calculator (Euro Converter) which will do currency conversions for libraries.

Euro Converter is pre-configured to use the conversion values for these eleven countries, as set December 31, 1998:

- Austria
- Belgium
- Finland
- France
- Germany
- Ireland
- Italy
- Luxembourg
- Netherlands
- Portugal
- Spain

Euro Converter lets you enter the value for one currency and specify the currency you want to calculate to.

This section explains these topics:

- Specifying Default Currencies
- Using Euro Converter to Calculate Currencies
Specifying Default Currencies

Before you can use Euro Converter, you need to specify these things:

- The default currency you want to convert from.
- The default currency you want to convert to.

In calculating the conversion rate from one currency to another, Euro Converter converts the From currency to Euros, then to the To currency:

\[ \text{"From" Amount} = \text{Euros} \]
\[ \text{"From" Rate} \]
\[ \text{Euros} \times \text{"To" Rate} = \text{"To" Amount} \]

For example, to convert Deutsche Marks to Lira, Euro Converter calculates the number of Euros to the Mark, then calculates the number of Lira to the Euro:

\[
\begin{align*}
10 \text{ DM} & \quad = \quad 5.11 \text{ Euros} \\
1.95583 \text{ (DM)} & \quad = \quad 5.11 \text{ Euros} \times 1936.27 \text{ (LR)} = 9,900 \text{ Lira}
\end{align*}
\]

To specify default currencies

1. Open the **euro_converter** view in the Table Editor. 
   Horizon displays the List Euro Conversion Rates window.

   ![List Euro Conversion Rates Window](image)

   This window lists the currencies available for conversion.

2. Double-click the currency that you want to be the default “From” currency.
Horizon displays the Edit Euro Conversion Rates window:

3 Mark the **Default From** box.
4 Click **Close**.
   Horizon returns to the Euro Conversion Rates list window.
5 Double-click the currency that you want to be the default “To” currency.
   Horizon displays the Edit Euro Conversion Rates window for that currency.
6 Mark the **Default To** box.
7 Save your changes.
8 Click **Close**.
Horizon returns to the List Euro Conversion Rates window:

![List Euro Conversion Rates window](image)

A check appears in the From and To columns next to the currencies you edited.

<table>
<thead>
<tr>
<th>Currency/Description</th>
<th>Rate</th>
<th>Scale/Decimals</th>
<th>From/To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nok Norwegian Krone</td>
<td>12700.00</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Bel Belgian Franc</td>
<td>403.50</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Dem Deutsche Mark</td>
<td>19563.00</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Eur Euro</td>
<td>1.00</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Pes Peseta</td>
<td>166366.00</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Finn Finnish Markka</td>
<td>064573.00</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>For French Franc</td>
<td>655467.00</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Irl Irish Punt</td>
<td>787564.00</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Ita Italian Lira</td>
<td>198327.00</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Lux Luxembourg Franc</td>
<td>403389.00</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Nvg Dutch Guilden</td>
<td>220521.00</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Pte Portugues Escudo</td>
<td>308462.00</td>
<td>3</td>
<td>0</td>
</tr>
</tbody>
</table>

With the default currencies configured, you are ready to use Euro Converter.

### Using Euro Converter to Calculate Currencies

The Euro Calculator uses the values in the euro_converter table in its calculations. Because of this, you need to log in to Horizon before you can start Euro Converter.

When you launch Euro Converter, you can keep it open in Windows, then switch to it any time you need using ALT + TAB.

You can add Euro Converter to the navigation bar. (For instructions, see “Adding a View as a Process to the Navigation Bar” on page 5-73.)

To use Euro Converter to calculate currencies

1. Log in to Horizon.
2. In Windows Explorer, open the folder where Horizon is installed.
Horizon launches the Euro Calculator:

To calculate currencies, do these steps:

1. Highlight a currency in the From list.
2. Highlight a currency in the To list.
3. Enter the amount of the currency in the From field.
4. Press ENTER or click Calculate to calculate the rate.

**NOTE**

When you click on other currencies in the From and To Lists, Euro Converter automatically recalculates the values in the fields below.

To calculate other currency amounts, do these steps:

1. Enter a new amount in the From field.

**NOTE**

Because the value in the From field is always selected, you do not need to delete it before entering a new amount.

When you use ALT+TAB to switch to Euro Converter, the “From” currency amount is automatically selected, so you can immediately enter the new amount.

2. If you want to clear the fields in Euro Converter, press ALT+C, or click CE to clear the fields.
6 As necessary, copy the results of the conversion, then paste them directly into Horizon where the value is needed.

NOTE

Because it is Windows-compliant, you can paste the data you copy from Euro Converter into any Windows application, not just Horizon applications.
Searching Setup

This chapter explains how to set up staff searching. Use this chapter to define the functionality and appearance of searching for your users.

- About Searching Setup 3-3
- Search Options 3-4
- StopWords 3-25
- Initial Articles 3-27
- Search Limits 3-28
- Search Restrictions 3-30
- PAC Flavors 3-36
- PAC Primary and Secondary Locations 3-45
- Z39.50 Communication 3-50
About Searching Setup

Horizon lets you customize the appearance and functionality of staff searching. For example, you can change the search options that display in the main Search window, the limiting options you can use for a search, and what information is displayed in search results windows. You can also modify the help text that displays on the Search window to help staff know how to enter searches. In addition, you can specify the words that you want Horizon to ignore during keyword and browse searches, such as articles or conjunctions. You can also control what location’s holdings display.

One of the main parameters that defines how searching functions is the PAC flavor. The flavors you set up determine what search options, search modes (for example, expert search), and reserve locations are available to users. Flavors also determine what views display in each search window. (For example, you can choose which view the flavor displays for the Bib Display window.)

While defining search parameters, you create the search options. Search options have parameters that determine which tables or indexes store the information from the database you want users to search on. Part of setting up search options includes assigning them to a flavor. You should define search options before you set up a flavor (keeping in mind the name of the flavor you will later assign to the search option). Then after you create a flavor, you can define restrictions and sort options associated with the flavor.

You can also determine other staff searching behavior, such as the flavor that you automatically use when you start staff searching or the number of records that display after users resume a keyword search. You control this behavior by adding switches to the staff searching process. (For information about switches for staff searching, see “Switches” on page 5-80.)

In addition, if you and another library use the Z39.50 protocol to communicate between your two databases, you can set up this protocol so Horizon can access that library’s database.

NOTE

The search settings (search options, search restrictions, PAC flavors, and so forth) that you set up in this chapter apply specifically to staff searching. The only search settings you set up in this chapter that apply to Horizon Information Portal are the search indexes used by a PAC flavor. (For more information about setting up search settings in Information Portal, see the Information Portal System Administrator’s Guide.)

This chapter explains these topics:

- Search Options
- StopWords
- Initial Articles
- Search Limits
- Search Restrictions
- PAC Flavors
- PAC Primary and Secondary Locations
- Z39.50 Communication
Search Options

Search options define the types of searches that you can use in your Horizon system. These options display in your main Search window in staff searching. This is an example of a search option in the main Search window:

- **Search types.** Horizon includes three types of search options—keyword, browse, and exact match. These types are based on the type of information that staff is searching for.

- **Horizon indexes or table information.** As it matches search terms, each search option uses either a Horizon index (sometimes referred to as a search index or mq_index) or a column in a database table. (For example, a “Title Keyword” search option might use an index to check all subfields in all title and contents note tags. A “Borrower Alphabetical” search option checks for borrowers in the borrower table and shows the name of the borrower that is closest to the name you entered.) Indexes help Horizon quickly search for information on the Horizon database and display search results based on search terms. You can assign one or more Horizon indexes to each search option. (For browse searches, Information Portal uses the same Horizon indexes that staff searching does. For more information, see the Information Portal System Administrator’s Guide.)

- **Display views.** These views control the display of search results in staff searching. (For example, each browse search option, such as “Author Browse” or “Subject Browse,” has a single corresponding view. Each authority-controlled keyword search option has a single corresponding view. However, bib-based keyword searches generally share a view.) Your Horizon system comes with default MARC maps that help display data in brief and long views in staff searching and Information Portal.

Horizon comes with a variety of default search options. You can modify the elements of these default search options, or create new search options. As described later in this section, there are some limitations on what you can change or create, but you can customize many search capabilities in Horizon.
This section explains these topics:

- Types of Search Options
- Search Option Attributes
- Creating Search Options

### Types of Search Options

Horizon has three types of searches:

- **Keyword search.** This type of search option lets staff enter a keyword that Horizon has indexed from a title field, subject heading field, content notes field, and so forth. In other words, this type of search finds a match for a keyword by comparing the search terms with a list of words that Horizon has compiled from MARC records or tables in the database. (For example, a title keyword search might compare search terms to data stored in all MARC title tags. A borrower name keyword search in Circulation might compare search terms to data stored in the borrower table.) In addition, you can set up a single search option based on multiple keyword indexes. This lets you search for MARC information that is in either authority-controlled or non-authority controlled subfields. When multiple records match the search term, the system displays a list of matches. This type of list is called a “closed” list.

- **Alphabetical or browse search.** This type of search option lets staff access an alphabetical list of all titles, authors, subjects, or series in Horizon. The search term staff enters for this type determines which part of the alphabet displays. For this search option, Horizon displays an alphabetical list of record information with the arrow cursor pointing at the entry that most closely matches the search term. (For example, if you did a subject alphabetical search for the word “language,” you would see the first subject heading in the list starting with “language,” and an arrow would point to the closest match. However, you could scroll up and down the alphabetical list and browse through all subject headings on the system.) This type of browsable list is also called an “open” list.

- **Exact match search.** Similar to an alphabetical index, this search lets you enter a word or number (such as an LCCN or ISBN) that is directly tied to only one record on the database. (For example, every item in your library will probably have a unique barcode, so when you conduct a barcode search, Horizon immediately displays the bibliographic record without showing a browse list.) In order to get results for an exact match, the user must enter the exact number. Use an exact match index to search for social security numbers, barcodes, and other items for which there is usually one unique match in the database.
Chapter 3: Searching Setup

Search Option Attributes

Before you create new search options, you need to understand each of the attributes that are related to the search options and how you can use them to set up a search option. (For example, you need to define the indexes or tables that a search option is based on.)

This section explains these topics:

- Windows That Search Options Appear On
- Indexes and Tables
- Help Text
- Search Examples
- Views Used to Display Search Results
- Single vs. Combined Indexes
- Sorting Subject Headings and Subheadings

Windows That Search Options Appear On

Search options appear on several Horizon windows. You can create or edit search options for most of these windows. You are probably most familiar with the main search window in staff searching:

Here are some other examples of search windows:

- **Borrower Search window in staff searching.** Lets you search for a borrower to place a hold request for or to view information about.
- **Borrower Search window in Circulation.** Lets you search for a borrower record to update.
- **PO and PR Search windows in Acquisitions.** Lets you search for purchase orders and purchase requests.
- **Serials Search windows in Serials Control and Serials Checkin.** Lets you search for copy records.
- **Instructor and Course Search windows in Reserve Bookroom.** Lets you search for course and instructor records.

For each window that displays search options, Horizon assigns a code. For search windows, this code corresponds exactly to the name of the PAC flavor that displays the window. Therefore, you might have several versions of a search window, one for each flavor. Codes for windows other than staff searching windows were assigned at the time of installation and you should not change them.

This table lists the windows you can create search options for, the code assigned to each window, and the purpose of each window:

<table>
<thead>
<tr>
<th>Window</th>
<th>Window Code</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrower</td>
<td>borr</td>
<td>To find borrower records in Circulation and Acquisitions processes</td>
</tr>
<tr>
<td>Borrower Request</td>
<td>borreq</td>
<td>To find a borrower when making a request in staff searching</td>
</tr>
<tr>
<td>Copy</td>
<td>copy</td>
<td>To find copy records in Serials</td>
</tr>
<tr>
<td>Search</td>
<td>the name of the PAC flavor (for example, stafpac)</td>
<td>To find bib records in staff searching</td>
</tr>
<tr>
<td>PO</td>
<td>po</td>
<td>To find purchase orders in Acquisitions</td>
</tr>
<tr>
<td>PO Line</td>
<td>poline</td>
<td>To find PO lines in Acquisitions</td>
</tr>
<tr>
<td>PR</td>
<td>pr</td>
<td>To find purchase requests in Acquisitions</td>
</tr>
<tr>
<td>RBR Course</td>
<td>rbrcors</td>
<td>To find reserve courses in Reserve Bookroom</td>
</tr>
<tr>
<td>RBR Instructor</td>
<td>rbrinst</td>
<td>To find reserve instructors in Reserve Bookroom</td>
</tr>
<tr>
<td>Statement</td>
<td>statmnt</td>
<td>To find statements in Acquisitions</td>
</tr>
<tr>
<td>Vendor</td>
<td>vendor</td>
<td>To find book and serials vendors in Acquisitions and Serials</td>
</tr>
<tr>
<td>Voucher</td>
<td>voucher</td>
<td>To find vouchers in Acquisitions</td>
</tr>
</tbody>
</table>
Indexes and Tables

A Horizon index—sometimes referred to as a search index or mq_index—is a tool that Horizon uses to manage the efficient storage and quick retrieval of information on your library’s database. Indexes are used in defining search options for staff searching. (In addition, Information Portal uses Horizon indexes for browse searching. For more information, see the Information Portal System Administrator's Guide.) Search options are based on either an index or a column in a table. The index is part of Horizon’s internal indexing system and determines how searched information is processed and displayed. (For example, title alphabetical information is stored and organized in the bib table differently from the way this information appears in tag 245. Consequently, the title alphabetical search requires an index that processes and changes the character of the data stored in the bib table so that it appears alphabetically.)

Some indexes link to MARC maps, which determine the tags and subfields checked during a search. Other indexes link to a table column, which is likewise checked during a search. (For example, a title keyword search might check an index with a MARC map containing all title tags. A borrower name alphabetical search would check an index that references the name column in the borrower table.)

Some search options do not require an index to process and display searched data. Instead, these options are linked directly to a table column because the information is stored in a way that can be displayed without any change or processing. Borrower barcodes, borrower second IDs, and PO numbers are examples of information that is stored exactly as it should appear in a search list.

You cannot create a search option without a corresponding index or table column. To determine whether to base a search option on an index or on a direct table column, use these general guidelines:

<table>
<thead>
<tr>
<th>Table 3-2: Data for a Search Option</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type of Search</strong></td>
</tr>
</tbody>
</table>
| Searches on MARC records | • Search for bib and authority information  
• Search for copy record information such as ISSN and UPC code  
• Search for PO information such as title keyword |  | X |  |
| Alphabetical, keyword, and call number searches | • Call number search  
• Alphabetical search by borrower last name  
• Keyword search on borrower name |  |  | X |
| Exact match searches on table information | • Item barcode search  
• Borrower barcode search  
• PO number search  
• Reserve instructor search |  |  | X |
Help Text

When users choose a search option in staff searching, help text appears on the search window explaining what the search contains or checks. For example, when users choose the Title Keyword option in staff searching, Horizon displays a prompt like this:

You can control what the prompt says in the Search window when you create or edit search options in the Lister Search Lists window. (For instructions, see “Creating Search Options” on page 3-11.)

Search Examples

After choosing a search option in staff searching, users can display examples of search strings for the selected search option and a description of the search results by clicking on Example on the bottom of the search window. Here is an example of the Search Example window for the Title Keyword search in staff searching:

You can control what examples display when you create or edit search options in the Lister Search Lists window. (For instructions, see “Creating Search Options” on page 3-11.)

NOTE

For more information on Horizon indexes, see “Understanding Indexing in Horizon” on page 4-3.
Views Used to Display Search Results

Views control the display of search results in staff searching. For each PAC flavor, you specify standard views for bibliographic and item displays, such as the Titles List window, Bibliographic Detail window, Copies window, and Request window. Consequently, you need to specify additional views only for search options that are not included in the standard list, such as subject keyword, series keyword, and call number. Views may be controlled by a MARC map. (For more information about views and MARC maps, see “MARC Maps” on page 2-93.)

You can control which view each search displays by entering the name of the view in the Lister Search Lists window when you create or edit search options. (For example, you might enter “closauth_subject” as the view for a subject keyword search.)

NOTE

You can tell that the closauth_subject index is for a subject keyword search from two clues. First, the name includes “clos,” which stands for a “closed” or finite list, and all keyword searches yield closed lists. The second clue is that if you open the Edit Horizon Index Definitions for the closauth_subject index, you will see the Index Type “keyword” selected.

After you create one or more views, you can assign them to search options. (For instructions on creating views, see “Changing the Display of Columns or Fields in List and Edit Windows” on page 7-28. For a list of views and the windows each view controls, see “Appendix A.”)

Single vs. Combined Indexes

You can specify one or more indexes when creating search options. A single search index looks for one piece of information. (For example, the Subject Keyword search option includes a single index and uses only one condition to find matches for the search criterion.) You can use a single index for a keyword, alphabetical, or exact match search.

A combined search index includes multiple indexes—one index for each keyword you want to find in the search. (For example, you can create a combined index to search for “Subject Keyword” and “Author Keyword.”) The result is an expanded search index that allows searching across multiple tags at the same time.

NOTE

You can combine only keyword indexes.

Combined keyword searches may slow the performance of the workstation. Horizon 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 Horizon Customer Support.

Sorting Subject Headings and Subheadings

Horizon lets you decide how subject headings are alphabetized in your indexes, which affects how subject headings display in PAC alphabetical subject heading lists. You can use one of two methods for alphabetizing your subject headings:

- Library of Congress order
- American Library Association filing rules
With Library of Congress (LC) order, the main subject headings are first alphabetized and then the subheadings are alphabetized under the main heading. These are some examples:

- Business
- Business–Communications
- Business–Dictionaries
- Business–Management
- Business Cycles
- Business Cycles–Forecasting
- Business Cycles–Mathematical Models
- Business Ethics
- Business Ethics–Case Studies
- Business Ethics–Philosophy

In the MARC record, main subject headings are stored in subfield $a$, and subheadings are stored in other subfields. In the above example, Horizon first alphabetizes the main subject headings listed in subfield $a$, and then alphabetizes the subheadings in the other subfields.

However, if your library wants to follow the American Library Association (ALA) filing rules, you can choose to ignore the “spacer” between subfields and alphabetize subject headings based on all subfields at once instead of first looking at just subfield $a$ and then the other subfields. For example, when the spacer is ignored, the above subject list displays with ALA filing rules like this:

- Business
- Business–Communications
- Business Cycles
- Business Cycles–Forecasting
- Business Cycles–Mathematical Models
- Business–Dictionaries
- Business Ethics
- Business Ethics–Case Studies
- Business Ethics–Philosophy
- Business–Management

### Creating Search Options

When you create a search option for staff searching, you specify different information, depending on whether the search is an alphabetical search, a keyword search, or an exact match search. When you set up search options, you define the indexes included in the search, the help text that appears when the search option is highlighted, examples of search strings for the option, and the view that displays search results.

This section explains these topics:

- Determining Whether a Search Option Is Based on an Index or a Table
- Creating a Single Alphabetical or Single Keyword Search Option
- Creating a Combined Keyword Search Option
- Creating a Search Option not Based on an Index
Determining Whether a Search Option Is Based on an Index or a Table

Before creating a search option, you need to determine whether to base it on an index and which one, or on a table and column and which ones. Table 3-2, “Data for a Search Option,” on page 3-8 can guide you in determining whether to use an index or a table. To determine which index or which table and column, you will need to do one of these tasks:

- Open the mq_index view to see a list of indexes. The MARC map and table columns are part of each index definition. (Horizon displays this information in the Edit Horizon Index Definitions window. The MARC map for the index definition displays in the marc_map field and the table columns for the index definition display in the Base Index Col. and N_Keys Col. field.)
- Run an SQL report to list all tables and columns.

Use the following sections to determine the index or table column needed to create the search option.

**NOTE**

If you do not specify either an index or a table column for each search option you create, staff searching displays an error message.
Creating a Single Alphabetical or Single Keyword Search Option

You can create single alphabetical or single keyword search options using an existing Horizon index. If you are not sure which index to use, open the mq_index view and display the MARC maps for the possible indexes you want to use. The MARC map determines what information from the MARC record is displayed in the view. (For more information about using MARC maps in staff searching, see “Understanding Indexing MARC Maps” on page 2-101.)

To create a single alphabetical or single keyword search option

View: search
Process: Searching\PAC Control Menu\Search Option Table

NOTE
You will seldom complete all the fields in this window. Depending on whether the option is based on an index or a table and column, you must complete either the Indexes group or the Table and Column fields, but never both.
### In this field | Do this
---|---
Search | Enter the code for the search flavor that uses this index (for example, stafpac or po).
The search name for staff search options should be the same as one of your PAC flavor names. You should have determined PAC flavors during implementation. To see which flavor names you can use, open the search view to display a list of flavors.

Index No. | Enter a number to specify the index order.
The number you enter determines the order in which the search appears in the main search window in staff searching.
The indexes can appear in any order, but each index in a specific PAC flavor must have a unique number. The default order numbers start at 30 and increase in increments of five or ten. This lets you add additional search options before the default set or between entries in the default set as needed.

Label | Enter a descriptive name for the index.
(For example, if you are setting up an index that searches for keywords in all titles, you might enter “Title Keyword”.)

Mq Index | Enter the index that the search option uses as it checks for matches on the search term entered by staff. You must complete this field.

[Table, or Column, or Foreign Key] | Leave these fields blank.
You use these fields for indexes built from database tables.
(For a description of these fields, see “Creating a Search Option not Based on an Index” on page 3-22.)
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry Aid Label</td>
<td>Complete this field only if the search option is a keyword search for which users can access a list of keywords or codes. This label appears on the entry aid button of the search window. For example, in the PR Search window in Acquisitions, the PR Categories search option requires users to enter one of a set of category codes. When users choose the PR Categories option, the Entry Aid button label changes to “PR Categories”:</td>
</tr>
<tr>
<td></td>
<td><img src="image1.png" alt="Image of PR Search window" /> Entry Aid label</td>
</tr>
<tr>
<td>Entry Aid View</td>
<td>Complete this field only if the search option is a keyword search for which users can access a list of keywords or codes. This is the view (or window) that Horizon displays when users click the entry aid button. For example, when users choose the PR Categories button, you would want Horizon to display the view that lists the PR categories:</td>
</tr>
<tr>
<td></td>
<td><img src="image2.png" alt="Image of PR Categories list" /></td>
</tr>
</tbody>
</table>
### Radio Long Values
If you want the full name (or description) to display beside the radio buttons that might display when using the “Entry Aid”, mark this box.

(For example, if users click the Entry Aid button when searching under “Fiscal Year Allocation,” they are given a choice of these Budget Statuses to search on: Open, Frozen, or Closed. If you mark this box, Horizon displays the full name or description of the budget status. If you do not mark this box, Horizon displays “O” for Open, “F” for Frozen, and “C” for Closed.)

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio Long Values</td>
<td>If you want the full name (or description) to display beside the radio buttons that might display when using the “Entry Aid”, mark this box.</td>
</tr>
<tr>
<td></td>
<td>(For example, if users click the Entry Aid button when searching under “Fiscal Year Allocation,” they are given a choice of these Budget Statuses to search on: Open, Frozen, or Closed. If you mark this box, Horizon displays the full name or description of the budget status. If you do not mark this box, Horizon displays “O” for Open, “F” for Frozen, and “C” for Closed.)</td>
</tr>
</tbody>
</table>

### Edit List Search Lists

<table>
<thead>
<tr>
<th>This index contains:</th>
<th>Budget years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example 1</td>
<td>&gt; 1992</td>
</tr>
<tr>
<td>Describe example 1</td>
<td>Use the greater than “&gt;”, less than “&lt;”, or the equality operator</td>
</tr>
<tr>
<td>Example 2</td>
<td>&lt;= 1980</td>
</tr>
<tr>
<td>Describe example 2</td>
<td>Lists all rows with a year not equal to 1988.</td>
</tr>
</tbody>
</table>

### In this field

<table>
<thead>
<tr>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the help text that you want to display for the search in the main search window.</td>
</tr>
<tr>
<td>(For example, for the Title Keyword search, you might enter “Single-hit words for variant titles of bibliographic records”.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Example 1</th>
<th>Enter an example of a search string a user might enter for this index.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example 1</td>
<td>(For example, the text for a Title Keyword search index might be, “EAQ”. Users can view this example by clicking the Example button in the main search window.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Describe example 1</th>
<th>Enter a description of the search results for example 1.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe example 1</td>
<td>(For example, the text for a Title Keyword search index might be “Employee Assistance Quarterly”.)</td>
</tr>
</tbody>
</table>
### Search Options

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example 2</td>
<td>Enter another example of a search string a user might enter for this index. Users can view this example by clicking the Example button in the main search window.</td>
</tr>
<tr>
<td>Describe example 2</td>
<td>Enter a description of the search results for example 2.</td>
</tr>
</tbody>
</table>
| Display View            | Enter or choose the view that displays the search results. Determine the correct view by figuring out which table (and hence view) stores and displays the information you want to retrieve. (For a list of the views and their corresponding windows, see “Horizon Views and the Windows They Configure” on page A-3.) Each PAC flavor already specifies standard views for bibliographic and item displays. Consequently, you need to specify additional views only for indexes that are not included in the standard list, such as subject keyword and series keyword. (For information on views specified in PAC flavors, see “PAC Flavors” on page 3-36.) Complete this field only when the search option is one of these types:  
  - A **combined keyword index for staff searching**. Usually, the display view will be the one used to display the titles list window.  
  - An **option not included in the PAC flavor list**. Examples of searches you might enter include a display view for a subject keyword or a call number search. (For example, you might enter “closauth_subject” as the view for a subject keyword search.)  
  - An **option that is not a bibliographic search**. An example is the PO Title Alphabetical search in Acquisitions or the Borrower Name Alphabetical search in Circulation. |
| Short Name              | Enter the short title for this index used while searching in expert search mode. Expert search mode lets you conduct searches using a command line that allows for more complex search strings and lets you combine keyword indexes in a single search. In expert search mode, the short title is used in the search command to identify the index or indexes to search. **IMPORTANT** If you want to display expert mode in staff searching, you must enter a short name for your keyword search option in this field. |
| Z39.50 Use Attr.        | If you need to set up your database so Z39.50 server-compliant clients can search it, enter or choose the Z39.50 use attribute code that links to the search.                                                |
| Univ. Code (PAC for Win.)| Leave this field blank.                                                                                                                                                                               |
Creating a Combined Keyword Search Option

You create combined keyword search options using two or more existing indexes. If you are unsure about which indexes to use, open the index table and display the MARC maps for the possible indexes you want to use. The MARC map determines what information from the MARC record is displayed in the view. (For more information about using MARC maps in staff searching, see “Understanding Indexing MARC Maps” on page 2-101.)

Combined keyword searches may slow the performance of the workstation. Horizon 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 Horizon Customer Support.

**NOTE**

The task in this section describes only those fields necessary for the task. If this task does not describe a field, leave the field blank. (For a complete description of all fields in the window, see “Creating a Single Alphabetical or Single Keyword Search Option” on page 3-13.)

**NOTE**

You can create combined indexes only for keyword searches in the New Search process.

To create a combined keyword search option

**View:** search  
**Process:** Searching\PAC Control Menu\Search Option Table

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Enter the code for the search flavor that uses this index.</td>
</tr>
</tbody>
</table>
### Search Options

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Index No.</strong></td>
<td>Enter a number to specify the index order. The number you enter determines the order in which the search appears in the main search window. The indexes can appear in any order, but each index in a specific PAC flavor must have a unique number.</td>
</tr>
<tr>
<td><strong>Label</strong></td>
<td>Enter a descriptive name for the index.</td>
</tr>
</tbody>
</table>
| **Mq Index**  | Enter the first index the search option uses to find and display the information.  
**IMPORTANT**  
You should only use indexes designed for a keyword search option.  
1 Click **New** to display a blank group entry.  
2 Enter the next index that the search option uses to find and display the information in the **Mq Index** field.  
3 Repeat these steps to add the remaining indexes. |
| **Entry Aid Label** | Complete this field only if the search option is a combined keyword search for which users can access a list of keywords or codes.  
This label appears on the entry aid button of the search window.  
For example, in the PR Search window in Acquisitions, the PR Categories search option requires users to enter one of a set of category codes. When users choose the PR Categories option, the Entry Aid button label changes to “PR Categories”: |

![Image of a search window with entry aid label highlighted]
### Chapter 3: Searching Setup

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Entry Aid View</strong></td>
<td>Complete this field only if the search option is a combined keyword search for which users can access a list of keywords or codes. This is the view (or window) that Horizon displays when users click the entry aid button. For example, when Acquisitions users choose the PR Categories button, you would want Horizon to display the view that lists the PR categories:</td>
</tr>
</tbody>
</table>

![Image of Entry Aid View](image)

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>This index contains</strong></td>
<td>Enter the help text that you want to display for the search in the main search window.</td>
</tr>
<tr>
<td><strong>Example 1</strong></td>
<td>Enter an example of a search string users might enter for this index. Users can view these examples by clicking the Example button in the main search window.</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Describe example 1</td>
<td>Enter a description of the search results for example 1. (For example, the text for a Title Keyword search index might be, ”Words from titles and contents notes.”)</td>
</tr>
<tr>
<td>Example 2</td>
<td>Enter another example of a search string users might enter for this index. Users can view these examples by clicking the Example button in the main search window.</td>
</tr>
<tr>
<td>Describe example 2</td>
<td>Enter a description of the search results for example 2.</td>
</tr>
</tbody>
</table>
| Display View          | Enter or choose the view that displays the search results. Determine the right view by figuring out which table (and, therefore, view) stores and displays the information you want to retrieve. (For a list of windows and their corresponding views, see “Horizon Views” on page A-4.) Each PAC flavor already specifies standard views for bibliographic and item displays. Consequently, you need to specify additional views only for indexes that are not included in the standard list, such as subject keyword and series keyword. (For information on views specified in PAC flavors, see “PAC Flavors” on page 3-36.) Complete this field only when the search option is one of these types:  
  • A **combined keyword index for staff searching.** Usually, the display view will be the one used to display the titles list window.  
  • An **option not included in the PAC flavor list.** Examples of searches you might enter include a display view for a subject keyword or a call number search. (For example, you might enter “closauth_subject” as the view for a subject keyword search.)  
  • An **option that is not a bibliographic search.** An example is the PO Title Alphabetical search in Acquisitions or the Borrower Name Alphabetical search in Circulation. |
Creating a Search Option not Based on an Index

Most search options that yield exact match searches, such as item barcode and purchase order number searches, are based directly on the table and column where the information is stored. Consequently, you do not need to specify an index for these search options.

NOTE
To determine which searches you do not need an index for, see the table in “Indexes and Tables” on page 3-8.

NOTE
The task in this section describes only those fields necessary for the task. If this task does not describe a field, leave the field blank. (For a complete description of all fields in the window, see “Creating a Single Alphabetical or Single Keyword Search Option” on page 3-13.)

Before You Begin

You must know the table and column names that the search uses. For example, an item barcode search would search the ibarcode column in the item table. (For more information on table and column names, see the Table Structures Guide.)

To create a search option not based on an index

View: search
Process: Searching\PAC Control Menu\Search Option Table
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Enter the code for the PAC flavor or window that displays this search option. To determine which search window to add the option to, see the table in the “Windows That Search Options Appear On” section on page 3-6. Or, you can make an educated guess about which code corresponds to which window. (For example, if the search is for borrower information in Circulation, the search option code is “borr” which corresponds to the Borrower window.)</td>
</tr>
<tr>
<td>Index No.</td>
<td>Enter a number to specify the index order. The number you enter determines the order in which the search appears in the main search window. The indexes can appear in any order, but each index in a search window must have a unique number.</td>
</tr>
<tr>
<td>Label</td>
<td>Enter a descriptive name for the index.</td>
</tr>
<tr>
<td>Mq Index</td>
<td>Leave this field empty.</td>
</tr>
<tr>
<td>-or- [Table]</td>
<td>Enter the table that contains the column with the information you want to search for.</td>
</tr>
<tr>
<td>Column</td>
<td>Enter the column that stores the information.</td>
</tr>
<tr>
<td>Foreign Key]</td>
<td>Enter the column that links the table you filled in with the table that stores most of the information that the search should retrieve. (For example, if you are creating a borrower barcode search option, you need to specify the column borrower# as the foreign key. This is necessary because borrower barcodes are stored in a separate table from other borrower information, such as name. The foreign key links the barcode to the correct borrower so that the search result includes the borrower’s name and so forth.) You do not need to fill in this field every time.</td>
</tr>
</tbody>
</table>
### In this field

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>This index contains</td>
<td>Enter the help text that you want to display for the search in the main search window.</td>
</tr>
</tbody>
</table>
| Example 1 | Enter an example of a search string a user might enter for this index.  
Users can view this example by clicking the Example button in the search window. |
| Describe example 1 | Enter a description of the search results for this example. |
| Example 2 | Enter another example of a search string a user might enter for this index.  
Users can view this example by clicking the Example button in the search window. |
| Describe example 2 | Enter a description of the search results for this example. |
StopWords

Stopwords are words that Horizon ignores or omits from keyword search indexes. (For example, if you want searches to ignore articles, such as “a” or “the,” you can designate these words as stopwords.) You can also specify words that you want Horizon to ignore in browse searches. (For more information, see “Initial Articles” on page 3-27.)

Horizon comes with these predefined stopwords:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display View</td>
<td>Enter or choose the view that displays the search results only when the search option is one of these types:</td>
</tr>
<tr>
<td></td>
<td>• <strong>A combined keyword index for staff searching.</strong> Usually, the display view will be the one used to display the titles list window.</td>
</tr>
<tr>
<td></td>
<td>• <strong>An option not included in the PAC flavor list.</strong> Examples of searches you might enter include a display view for a subject keyword or call number search. (For example, you might enter “closauth_subject” as the view for a subject keyword search.)</td>
</tr>
<tr>
<td></td>
<td>• <strong>An option that is not a bibliographic search.</strong> An example is the PO Title Alphabetical search in Acquisitions or the Borrower Name Alphabetical search in Circulation.</td>
</tr>
<tr>
<td></td>
<td>You can determine the right view by figuring out which table (and hence view) stores and displays the information you want to retrieve. (For a list of windows and their corresponding views, see “Horizon Views and the Windows They Configure” on page A-3.)</td>
</tr>
</tbody>
</table>

**NOTE**

To see what information a view displays, open the view definition for the view and page down to the List View group. This group displays the information displayed for each column in the view.

The subject delimiter (--) is defined as a stopword so staff or borrowers will not have to enter the delimiter as a part of the search in order for the subject listing to display in the search results.
Chapter 3: Searching Setup

To set up stopwords

<table>
<thead>
<tr>
<th>View:</th>
<th>stopword</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process:</td>
<td>Administration\Index Control Menu\Stop Word Table</td>
</tr>
</tbody>
</table>

In this field Do this

| stopword | Enter the word you want to use as a stopword. |

**NOTE**

You can choose to use the stopwords you set up for keyword searching in Information Portal as well as staff searching. (For more information on using stopwords in Information Portal, see the Information Portal Administrator’s Guide.)
Initial Articles

Horizon lets you specify which articles (such as “a,” “an,” and “the”) you want to ignore at the beginning of a name or title for browse searches. (For example, if you want Horizon to ignore the article “a” in browse searching, you would enter “a” in the article view. If you search for *A Tale of Two Cities*, Horizon ignores the “A” and searches for “Tale of Two Cities”.)

In some cases, you may not want the system to ignore the term, as when searching the name “Le Carre” or the title “Los Angeles”. You can also specify these exceptions.

You can also specify words that you want Horizon to ignore in keyword searches. (For more information, see “StopWords” on page 3-25.)

**NOTE**

Entering an article in the article view does not change any index used in alphabetical searching. You do not have to reindex if you enter articles in the article view. In addition, articles in the article view do not affect processed strings.

**To set up initial articles**

<table>
<thead>
<tr>
<th>View:</th>
<th>article</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process:</td>
<td>Administration\Index Control\Leading Article</td>
</tr>
</tbody>
</table>

![Edit Initial Articles dialog box](image-url)
Chapter 3: Searching Setup

Search Limits

You can determine which search limiting options are available to let users limit a list of titles by certain criteria (for example, publication date). Staff searching displays these options in the Search Limit window when users click Limit from a Titles List window:

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article</td>
<td>Enter or edit the article you want Horizon to ignore in browse searching. (For example, you would enter “a” to have Horizon ignore “a” in browse searches.)</td>
</tr>
<tr>
<td>Description</td>
<td>Enter or edit a description of the article. (For example, you may enter the languages this article applies to.)</td>
</tr>
<tr>
<td>Exceptions</td>
<td>1 In the Phrase field, enter the phrase with the article that you want to include in browse searching. 2 Click New to create additional exception phrases.</td>
</tr>
</tbody>
</table>

Horizon can use MARC maps defined in the marc_map table as search limiting options (for example, pubdate). You determine which search limiting options are available to users in staff searching by choosing this feature in the marc_map table. (For more information about MARC maps and a description of the Edit MARC Map window, see “Understanding Conditional Parts of a MARC Map” on page 2-96.)

Search limiting based on MARC data lets searchers narrow a list of matches. You can use it to “weed out” unwanted matches in a keyword search after it has already been initiated. You limit the search by specifying these parameters:

- Field option
- Limiting operator
- Limiting value
For example, if you do a title keyword search for the word “computers,” several titles may be listed. If you want only the latest information on computers, you can limit the search date by choosing “publication date” as the field option, selecting “greater than” as the limiting operator, and entering “2002” as the limiting value. Horizon regenerates the list, showing only those titles published after 2002.

To set up search limits

1. Open the marc_map view in the Table Editor, or start the MARC Map Table process. The default location of this process is the Administration\Index Control Menu folder. Horizon displays the List MARC Map window.
2. Choose the MARC map you want to set up search limiting options for. Horizon displays the Edit MARC Map window:

   ![Edit: MARC Map window]

4. Save your changes.

   **NOTE**

   You must restart Horizon for the Search Limit window to display this new search limiting option.
Search Restrictions

You can let users restrict searches to titles with items that meet certain criteria. These restriction criteria include all common locations, item statuses, collections, item types, withdrawal instructions, and call number types.

Staff searching in Horizon uses restriction values you set up in this section. You set up Information Portal restrictions using the Information Portal Administration tool. (For instructions, see the Information Portal System Administrator’s Guide.)

NOTE

Be careful about setting up restrictions. Too many restrictions may exclude records that should be included in the search procedure.

Users choose restriction criteria from the Restrict Title Display window in staff searching:

After you define item and location restrictions, you can then assign them to a flavor. If you have not created all of the PAC flavors you want, you should do so before assigning restriction parameters. (For instructions, see “Creating a PAC Flavor” on page 3-37.)

For staff PAC flavors the restriction criteria are all based on this information in item records:

- Item status
- Item collection
- Item type
- Location

For example, a staff user may want to find only nonfiction items (collection), bring up only items that are checked in (item status), or just search items housed at a specific library (location).

This section explains these topics:

- Setting Up Item Restriction Criteria for a Flavor
- Setting Up Location Restrictions for a Flavor
Setting Up Item Restriction Criteria for a Flavor

You can set up restrictions to let users restrict or limit searches to items that meet certain criteria. You can set up these restrictions by PAC flavor.

This section explains these topics:

- Defining Item Restriction Criteria
- Assigning Item Restriction Criteria to a PAC Flavor

Defining Item Restriction Criteria

You can let users restrict search results to item-level criteria. This criteria can include these things:

- Collection
- Status
- Item type

If you want, you can combine restriction criteria. (For example, users may want to find only those items that are fiction [collection] and are checked in [status].) You set up the criteria that users can choose.

To define item restriction criteria

View: restriction
### Chapter 3: Searching Setup

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| **Restriction**        | Enter a code that refers to the restriction criteria you are setting up.  
                        | (For example, if you want the option to search only periodicals, you would enter “per”. To search only fiction materials, you might enter “fic”.) |
| **Description**        | Enter a description for the restriction criterion.  
                        | (For example, you might enter “Periodicals (collection)” as the description for the Restriction “per”.) |
| **Definition**         | Enter the group information for **Ord**, **Item Table Column**, **Exclude**, and **Value(s)** for each restriction criterion.  
                        | Each new group entry creates a more specific restriction.  
                        | Depending on the restriction you are defining, you may need to enter more than one group entry. (For example, if the restriction is periodicals, you only need one group entry. If the restriction is paperback fiction, you need two group entries—one for fiction and one for paperbacks.) |
| **Ord**                | Enter the order in which each restriction is listed within the restriction set.  
                        | You should give the most specific restriction the first order, and give the least specific restriction the last order. If the restriction has more than one group entry, each entry must have a unique ord number. |
| **Item Table Column**  | Enter the name of the column in the Item table that Horizon restricts by. (For example, if the restriction is the Periodicals collection, you would enter “collection”. If the restriction is to an item type of paperback, you would enter “item_type”. ) |
| **Exclude**            | Do one of these options:  
                        | ✷ If you want to search everything for this restriction except the criterion you are setting up, mark **Exclude**.  
                        | ✷ If you want the criterion you are setting up to be included in the search, mark **Include**.  
                        | (For example, to restrict a search to fiction but not paperback fiction, mark Include in the fiction group entry and mark Exclude in the paperback group entry.) |

**NOTE**

These are the columns in the item table that you can restrict by: `call_type`, `collection`, `item_status`, `itype`, `location`, `saved_collection`, `saved_itype`, `saved_location`, and `withdraw_instruction`. 
Assigning Item Restriction Criteria to a PAC Flavor

After you define search restriction parameters, you can assign them to your PAC flavors. You can assign the same set of restriction parameters to all flavors, or you can assign different sets of parameters to each flavor.

To assign item restriction criteria to a PAC flavor

<table>
<thead>
<tr>
<th>View: restriction</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value(s)</td>
<td>Enter all possible values that an item can have to qualify as a match for the restriction. You must enter valid codes based on what you entered in the Item Table Column field. For example, if you entered “itype” in the Item Table Column field and you want to restrict the search to audio and visual materials, enter the item circulation types (ITYPEs) on your system for audio and visual materials. For example, enter “’av’,’vid’.”</td>
</tr>
</tbody>
</table>

**NOTE**

Each code must be enclosed in single quotes. You can enter two or more values by enclosing each value in single quotes, separated by a comma placed outside the quotes (for example, ‘fic’, ‘hist’). You can combine multiple values for the same criterion in a single string, but you cannot combine multiple values for different criteria in the same string. (For example, you can create a criterion for collection and include the values fiction and history, but you cannot combine a collection with a status such as ‘fic’, ‘in’.)

You now need to assign the restriction criteria to one or more PAC flavors. (For instructions, see “Assigning Item Restriction Criteria to a PAC Flavor” on page 3-32.)
Chapter 3: Searching Setup

In this field | Do this
---|---
Search | Enter or choose the code of the PAC flavor that you want to assign a search restriction to.
Restriction | Enter or choose the code of the restriction that you want to include in the PAC flavor.
This should match the Restriction field that you defined in the Edit Title Restriction window. (For more information, see “Defining Item Restriction Criteria” on page 3-31.)
Order | Enter the numerical order in which you want the restriction to be listed on the Restrict Title Display in staff searching for this PAC flavor. Each restriction for a flavor must have its own number.
(For example, if you want the restriction “chk-in” [checked in items] to appear first in the list, you would type “0” as the order. A restriction that appears second would be “1”, and so forth.)
Label | Enter the label that you want staff searching to display in the Restrict window in staff searching for this restriction set.
(For example, if you created a restriction set for items with the status of “Checked In,” you might want the label to be “Available for checkout.”)

**NOTE**
You now need to set up locations available for restriction in each flavor. (For instructions, see “Setting Up Location Restrictions for a Flavor” on page 3-35.)
Setting Up Location Restrictions for a Flavor

For each PAC flavor, you can specify the locations that users can restrict searches to. (For example, a user may want to find items that are nonfiction, checked in, and located in the local branch.) The locations you can choose from are defined in the location table. (For more information, see “Library Locations” on page 2-19.)

To set up location restrictions for a flavor

View: pac_restriction_location

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Enter or choose the code of the PAC flavor that you want to define location restrictions for.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter or choose the code of the location that you want to include in the Restrict window of the PAC flavor. All locations for your library should appear in this list. If any are missing, you need to set them up. (For instructions, see “Library Locations” on page 2-19.)</td>
</tr>
</tbody>
</table>
Chapter 3: Searching Setup

PAC Flavors

PAC flavors are customized versions of your searching catalog. Many libraries choose to customize their PAC search options for various user groups by setting up more than one version of PAC. (For example, you may want to have one set of standard searches available to the general public, and a more comprehensive set available to staff.) The different versions of PAC are called PAC flavors. Each PAC flavor can have its own customized search options and bib displays. In addition, PAC flavors control display of reserve locations, whether you allow copy-level requests, and so forth. Your Horizon system comes with these PAC flavors:

- **StaffPac.** This is the PAC flavor used for staff searches.
- **iportal.** This is the name of the flavor used for public searches via Horizon Information Portal.

You can define as many PAC flavors as you need. (For example, you might create a flavor call “circpac” for circulation staff and a flavor called “catpac” for cataloging staff.) PAC flavors control these attributes in staff searching:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Order         | Enter the numerical order in which you want the location to appear in the Restrict Title Display window for this PAC flavor. Each location restriction for a flavor must have its own order number.  
(For example, if you want your local location to appear first in the list, you would enter “0” as the order. A location that appears second would be “1”, and so forth.) |
| Default       | Mark this box if you want the location to be selected (highlighted) by default when the user accesses the Restrict window in staff searching.  
All locations checked as default appear highlighted when the Restrict window opens. Users can keep the default selections or choose different ones. |

Views (windows) that display title and item search results. These search windows include the Titles List window, the Bibliographic Detail window, Copies List window, and the Bookmark and Request windows. For each of these windows, a view controls the type of information that is displayed and how it is displayed. MARC maps assigned to these search views extract and display MARC information.

Search options. The search options available in the main search window. A staff flavor might include search options that are useful to staff, such as ISBN and ISSN. A public flavor might provide basic search options such as alphabetical and keyword searches.

Reserve locations. The locations users can switch to and search for reserve items.

You must specify these parts when creating or editing a PAC flavor.
Creating a PAC Flavor

Your Horizon system comes with at least two PAC flavors installed. You can use one of the existing flavors to create new ones by copying and editing that flavor, or you can create flavors from scratch. The steps in the following sections assume that you are editing an existing flavor, but you can create a new flavor from scratch using the same steps.

Before You Begin

Before you create a PAC flavor, you must plan the information you want to enter. Some information must be set up before you can enter it into a PAC flavor. This table lists the information you must plan, whether it must be set up beforehand, and the views you use to set up the information.

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
<th>Set Up Beforehand</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search views</td>
<td>The views or windows in staff searching that display search results. If a view does not display the information you want, reconfigure the view. (For instructions, see “Changing the Display of Columns or Fields in List and Edit Windows” on page 7-28.)</td>
<td>Yes</td>
<td>mq_view</td>
</tr>
<tr>
<td>Search options</td>
<td>The search options that appear in the search window for that flavor. If an option you want does not exist, set it up first using the steps in “Creating Search Options” on page 3-11.</td>
<td>Yes</td>
<td>search</td>
</tr>
<tr>
<td>Secured message</td>
<td>The message that appears in place of secured bib records (records secured with 911 tags).</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Serial copy label</td>
<td>The label that appears on the Bibliographic Detail window for the summary of holdings of each serial copy (subscription).</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
To create a PAC flavor

1. Open the pac view in the Table Editor.
   Horizon displays the List Public Access Flavor window.
2. Create a new flavor, or choose the flavor you want to change.
   Horizon displays the Edit Public Access Flavor window:

   ![Edit Public Access Flavor](image)

3. Enter the code you want to assign to the new PAC flavor in the **Search Code** field.
4. Enter a description of the new flavor in the **Description** field.

Use this table as a guide in completing the remaining fields in the Edit Public Access Flavor window:

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
<th>Set Up Beforehand</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserve label</td>
<td>The label that appears on the entry aid button users click to display reserve locations they can switch to and search.</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Reserve locations</td>
<td>The reserve locations users can switch to and search.</td>
<td>Yes</td>
<td>location</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
<th>Set Up Beforehand</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserve label</td>
<td>The label that appears on the entry aid button users click to display reserve locations they can switch to and search.</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Reserve locations</td>
<td>The reserve locations users can switch to and search.</td>
<td>Yes</td>
<td>location</td>
</tr>
</tbody>
</table>
Assigning a View to a PAC Flavor

You can configure search windows to display certain bibliographic information in a certain order. A set of information is referred to as a “view.” Once these views are configured, you can specify which views appear in each PAC flavor.

Before You Begin

Make sure that search views have been defined for your system. (If they have not, see “Changing the Display of Columns or Fields in List and Edit Windows” on page 7-28 for instructions on defining search views before continuing.)

To assign a view to a PAC flavor

1. Open the pac view in the Table Editor.
   Horizon displays the List Public Access Flavor window.

2. Choose the flavor you want to change, or create a new flavor.
   Horizon displays the Edit Public Access Flavor window:

3. Complete these fields on the window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Code</td>
<td>Make sure this field displays the correct search code for the current PAC flavor.</td>
</tr>
<tr>
<td>Description</td>
<td>Make sure this field displays the correct description of the flavor (for example, “Public Access for staff”).</td>
</tr>
<tr>
<td>Bib Display View</td>
<td>Enter or choose the code that corresponds to the view that controls the information displayed in the Bibliographic Detail window.</td>
</tr>
</tbody>
</table>
### Table: Chapter 3: Searching Setup

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bib List View</td>
<td>Enter or choose the code that corresponds to the view that controls the information displayed the Titles List window.</td>
</tr>
</tbody>
</table>
| Secured Msg.           | Enter the message that appears in place of secured titles.  
                      | Your library can secure certain bib records so that public users cannot view those titles. A message appears in place of those titles in search windows, referred to as a secured message. You enter the message in this field. An example might be, “This title not available for general circulation.” |
| Item List View         | Enter or choose the code that controls the information displayed in the Copies window.                                                                                                                                     |
| Sav Bib List View      | Enter or choose the code for the view that controls the display of the List Saved Bibs window.                                                                                                                                |
|                        | This window displays titles that staff save or “mark” when they choose the Add Bookmark Entry command from the Bookmarks menu.                                                                                                  |
| Sav Item List View     | Enter or choose the code for the view that controls the display of the List Saved Items window.                                                                                                                                 |
|                        | This window displays items that staff save or “mark” when they choose the Add Bookmark Entry command from the Bookmarks menu.                                                                                                  |
| Request View           | Enter or choose the code for the view that controls the display of the List Requests window.                                                                                                                                  |
|                        | This window displays when users choose the View Request List from the Request menu.                                                                                                                                          |
| Serial Copy Label      | Enter the label you want to appear next to each copy record for a serial title (for example, “Serial Copy”). This label appears in the Bibliographic Detail window next to each copy record.                                        |

4. Save your changes.
Verifying the Search Options Used by a PAC Flavor

Horizon automatically assigns or links a search option to specific flavor when you assign a search name to a search option. (You enter the search name in the Search field on the Edit List Search Lists window. For more information, see “Creating Search Options” on page 3-11.) The search name that you give a search option must be the same name as the flavor you want that search option to display in. In other words, you do not assign each search option to a specific PAC flavor directly—Horizon does it for you.

Each workstation that accesses a different PAC flavor can contain different sets of search options. (For example, search options available at workstations used by borrowers might include Title Keyword, Title Alphabetical, Subject Keyword, and Author Alphabetical, while search options that are available at staff workstations might include ISSN, ISBN, LCCN, Call Number, Item Barcode, in addition to options that are available at public workstations.) Non-bibliographic search options (for example, PO line number) display the window code in the Search field. (For a list of these codes, see Table 3-1, “Search Option Windows,” on page 3-7.)

If you want, you can verify that your search names for each search option correspond to the flavor where you want those search options to appear.

<table>
<thead>
<tr>
<th>NOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>“borreq” search options appear automatically in any flavor of staff searching when users choose Requests. You do not need to enter the name of the flavor in the Search field.</td>
</tr>
</tbody>
</table>

To verify the search options used by a PAC Flavor

1. Open the search view in the Table Editor.
   Horizon displays the List Lister Search Lists window.
2. Choose the search option you want the PAC flavor to use.
   Horizon displays the Edit Lister Search Lists window.
3. Make sure the name of the flavor you want to assign the search option to appears in the Search field.
Chapter 3: Searching Setup

This should match the Search Code field in the Edit Public Access Flavor window. (For more information, see “Creating a PAC Flavor” on page 3-37.)

**NOTE**

If the search option displays non-bibliographic information, such as borrower information, the Search field displays a code and not a PAC flavor.

Assigning Reserve Locations to a PAC Flavor

**NOTE**

You do this task only if you have Reserve Bookroom.

In order to find a reserve title, users must search the correct reserve location (for example, medical reserve). When a user chooses a reserve search option (such as Instructor or Course), the text on the Entry Aid button in the main search window changes to “Reserve.” Clicking the Reserve button opens a list of reserve locations that lets users choose the reserve location that they want to search in. You can specify the locations that appear in the list for each PAC flavor.

**To assign reserve locations to a PAC flavor**

1. Open the pac view in the Table Editor.
   Horizon displays the List Public Access Flavor window.
2. Choose the flavor you want to change, or create a new flavor.
   Horizon displays the Edit Public Access Flavor window.
3. Click Page Down or resize the window to display the Reserve Location group:

   ![Reserve Location Group](image)

4. Complete these fields in the group:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter or choose the code for the reserve location you want to appear on the list. These codes are defined in the location view.</td>
</tr>
<tr>
<td>Order</td>
<td>Enter the number that corresponds to the position in which you want this location to appear in the list.</td>
</tr>
</tbody>
</table>

5. Click New and repeat step 4 for any remaining reserve locations.
6. Save your changes.
Assigning Alternate Bib Displays to a PAC Flavor

You can assign alternate bib displays to a flavor. This is useful if you want to have the Bibliographic Detail window display less information without changing the bib_disp view. Users can toggle between alternate bib displays in staff searching by choosing which bib display they want from the Window drop-down menu.

**Before You Begin**

Before you can assign an alternate bib display, you need to create new views for the alternate bib displays, such as “bibdisp2,” “bibdisp3,” and so forth. (For instructions on creating views, see “Creating Alternate Views” on page 7-42.) When you do this, write down the name of the alternate view that you create, so you can use it as you complete this task.

**To assign alternate bib displays to a PAC flavor**

1. Open the pac view in the Table Editor.
   Horizon displays the List Public Access Flavor window.
2. Choose the flavor you want to change, or create a new flavor.
   Horizon displays the Edit Public Access Flavor window.
3. Click Page Down or resize the window to display the Alternate Bib Display Views group:

   ![Alternate Bib Display Views](image)

4. In the Bib Display MQView field, enter the code of the bib display you want to use as an alternate.
   This should match the Mq View field from the Edit Horizon View window.
5. Save your changes.

**NOTE**

You must restart Horizon for the locations to appear in staff searching.
Assigning a Search Mode to a PAC Flavor

The search mode specifies what additional searching features are available to the borrower. These are the additional searching features that you can enable:

- **Expert mode.** This mode lets users conduct searches in staff searching using a command line. (For more information, see “Doing an Expert Search” in the “Searching” chapter of the *Horizon Basics Guide*.)

- **Bib Keyword: Trace Links.** This mode lets staff searching display a broader range of hits if bib records are linked in the database. If your search response time is too slow, you can turn off this mode.

**To assign a search mode to a PAC flavor**

1. Open the pac view in the Table Editor.
   Horizon displays the List Public Access Flavor window.
2. Choose the flavor you want to change.
   Horizon displays the Edit Public Access Flavor window.
3. Click **Page Down** or resize the window to display the search mode options:

![Edit Public Access Flavor](image)

4. Do one or both of these options:
   - Mark the **Enable Expert Mode** box to let users do command-line searches in staff searching.
   - Mark the **Bib Keyword: Trace Links** box to let users view linked bib information in the Bibliographic Display field in staff searching.

5. Save your changes.
Implementing a PAC Flavor

After you create a PAC flavor, you can apply the flavor to the search process in Launcher preferences. You do this for a group of users in preference groups. (For information about preference groups, see “Setting Up Preferences for Users” on page 5-63.)

To implement a PAC flavor

1. Start the Preference Group Manager process.
   The default location of this process is the Administration folder on the navigation bar.
   Horizon displays the Preference Group Manager window.
2. In the Preference Group drop-down list, choose the preference group for the users whose PAC flavor you want to change.
3. Make sure Launcher displays in the Customize drop-down list.
4. Click Modify.
   Horizon displays Customize Launcher window.
5. Click the Navigation Bar tab.
6. In the list of folders and processes on the left, highlight the search process.
   (The default name of this process is New Search.)
7. In Arguments field, enter “/flavorname” (where flavorname is the name of the PAC flavor you want to apply).
8. Click OK.
9. Click Close to close the Preference Group Manager.

PAC Primary and Secondary Locations

When users search in staff searching, the Copies window automatically displays holdings for the location that the user is logged on to:
This location is referred to as the “primary location.” If your library has more than one location, users can display holdings for other locations by clicking the All Locations button. These other locations are referred to as “secondary locations.” If necessary, you can change the text that appears on the All Locations button.

You can define the primary and secondary locations for each location in the location table on the PAC Locations view. You can also use the location table to change the labels that appear on the button in staff searching that lets users toggle between holdings for the primary and secondary locations.

If you have titles for which you do not create item records, such as serials, you can let users view holdings of the title for all locations in the Bibliographic Detail window in staff searching. To do this, you need to specify each location you want to view on the Bibliographic Detail window as a primary location. Staff searching then displays the holdings for those locations in the Bibliographic Detail window, sorted alphabetically by location.

You need to set up these parameters to specify primary and secondary locations:

- **Primary locations.** The locations with holdings that appear by default in the Copies window.
- **Secondary locations.** The locations with holdings that appear when the secondary location button is chosen.
- **Order.** The order in which staff searching displays each location’s items.

**Before You Begin**

Make sure you have location records for all locations. (For more information on setting up location records, see “Library Locations” on page 2-19.)

**To specify PAC primary and secondary locations**

1. Open the location view in the Table Editor, or start the Location Parameters process.
   The default location of this process is the Administration\System Setup folder on the navigation bar.
   Horizon displays the List Location Parameters window.
2. Choose the location you want to specify primary and secondary locations for.
   Horizon displays the Edit Location Parameters window.
3 Click **Page Down** or resize the window to display the **Locations** group:

![Edit: Location Parameters](image)

4 Complete these fields on the window:

**NOTE**

For specific examples on how to set up Primary and Secondary locations, see “Examples of Primary and Secondary Location Setup” on page 3-48.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Enter the code for the location the primary location can access. Generally, if the location is the one for which you opened the location view, it should be the primary location. However, if you want to display all holdings in the Bibliographic Detail window for the location you are specifying, create a new location entry in this group for each of your locations and specify each as primary.</td>
</tr>
<tr>
<td>Primary/Secondary</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark <strong>Primary Location</strong> if you want to assign the location in the Location field as the primary location.</td>
</tr>
<tr>
<td></td>
<td>• Mark <strong>Secondary Location</strong> if you want to assign the location in the Location field as the secondary location.</td>
</tr>
<tr>
<td></td>
<td>This field specifies that the location acts as a primary or secondary location in relation to the location for which you opened the location table.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> If you want items to be assigned to both a primary and secondary location, mark both options.</td>
</tr>
</tbody>
</table>
Chapter 3: Searching Setup

Examples of Primary and Secondary Location Setup

This table describes primary and secondary location setup examples:

<table>
<thead>
<tr>
<th>If you want to display this</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>All holdings from several locations in the same building at the “primary” level.</td>
<td>1 In the Locations group, create a location group entry for each location you have in the building.</td>
</tr>
<tr>
<td></td>
<td>2 Mark the Primary option for each location.</td>
</tr>
<tr>
<td></td>
<td>3 In the Sort Order field, enter the numerical order that staff searching displays holdings for each location in the Copies window.</td>
</tr>
<tr>
<td></td>
<td>All locations’ holdings will display in the main Copies window in the order you specified in the Sort Order field.</td>
</tr>
</tbody>
</table>

5 Save your changes.
<table>
<thead>
<tr>
<th>If you want to display this</th>
<th>Do this</th>
</tr>
</thead>
</table>
| All holdings for your secondary locations in an order other than alphabetical by location code | 1 In the Locations group, create a location group entry for each secondary location.  
2 Mark the Secondary option for each location.  
3 In the Sort Order field, enter the numerical order that staff searching displays holdings for each secondary location.  
When you click the Secondary Location button in the Copies window, all holdings from your secondary locations will display in the order you specified in the Sort Order field. |
Chapter 3: Searching Setup

Z39.50 Communication

If you and another library use the Z39.50 protocol, Horizon can access that library’s database. Before you can search another library database using this protocol, you must create a configuration file (*.zcf) for that library. You must also tell Horizon where to locate that file. You must do both of these tasks for each library whose database you want to search.

This section explains these topics:

- Setting Up a Z39.50 Configuration File
- Storing Another Library’s Z39.50 Configuration Information

Setting Up a Z39.50 Configuration File

To let users search a Z39.50 library, you must create a configuration (.zcf) file specifically for that library. Horizon includes a default configuration file that you can copy and modify. This file is called “default.zcf” and is located in the main Horizon directory. You should rename the file so that you can identify it easily with the library it configures. (If you let borrowers access Z39.50 libraries through a PAC, you may want to use the same name for these configuration files that you used when you configured your PAC.)

This configuration file includes information that is required to log in to the remote Z-server. It also includes searching attributes of the remote Z39.50 library.

The Z39.50 protocol uses search attributes to define search types. You need to make sure that each use, structure, and truncation attribute used by the Z-server corresponds to the local Horizon database prefixes used by your library. (For example, if you want to let users search the Library of Congress and they support Title Keyword searches, you need to find out what use attribute represents this search and match it with the keyword [field] search prefix you use to represent Title Keyword searches in your library.)

The configuration file includes these three sections that you can change:

- **Z_ATOMS.** This section contains the necessary information to let your system access the remote Z-server.
- **USER_ATOMS.** This section contains the user name and password required to log into the remote Z-server.
- **SEARCHES.** This section contains the information that lets you match Z39.50 search attributes with the keyword (field) and browse search prefixes defined for your location Horizon database with the corresponding use attributes for the remote Z39.50 database.

(The file also includes an “OIDS” section that you cannot change.)

Before You Begin

Contact the remote Z39.50 library for which you are setting up a configuration file. You need the following information about their server and database:

- **Socket (port number).** Determine the socket (port number) the remote Z39.50 server listens on for search requests.
- **Database.** Determine the name of the database to access from the Z39.50 library. This name must be exact, including case.
- **IP Address.** Determine the IP address of the Z-server for the remote Z39.50 library.
- **User Name and Password.** If required, determine the user name and password required to access the Z39.50 database.
• **Use Attributes.** Determine the use attributes defined by the remote Z39.50 library for keyword and browse searches. Then determine the corresponding keyword and browse search prefixes defined in your local Horizon database.

• **Structure.** Determine the structure values defined by the remote Z39.50 library.

• **Truncation.** Determine the truncation values defined by the remote Z39.50 library.

---

**NOTE**

Some Internet sites for individual libraries provide this information. There are also sites that compile this information such as:

http://www.indexdata.dk/targettest/

http://calstate.edu/uias/Z3950Hosts.shtml

These sites may give information you need for your configuration file.

---

**To set up a Z39.50 configuration file**

1. Find the “default.zcf” file located in the main Horizon folder, and copy it.

2. Rename the new file to a name that will help you remember which library this configuration file is for.

   Be sure to leave the extension “.zcf” intact.

3. In a text editor, open the new file you created.

---

**WARNING**

Do *not* change the order of any of the sections in the configuration file. This can corrupt the configuration file. However, you can add parameters to these sections as long as they conform to the same standards.
4 Review the Z_ATOMS section of the ".zcf" file you created:

```
ZCF {
    Z_ATOMS {
        SOCKET = 210;
        TIMEOUT = 90;
        PRESENTCOUNT = 10;
        SMALLSETUB = 0;
        MEDIUMSETPN = 0;
        LARGESETLB = 1;
        I2TITLESORT = 1;
        SEARCHLIMIT = 500;
        PREFMESSAGESIZE = 1024;
        MAXRECORDSIZE = 1048576;
        DATABASE = thedatabasename;
        DEFAULTOP = and;
        SITE = "Dynix Z Server";
        DESCRIPTION = "Dynix Z Server";
        IPADDRESS = "123.123.123.123";
        IMPLEMENTATIONID = "Dynix";
        IMPLEMENTATIONNAME = "Z3950";
    }
}
```

Replace this

<table>
<thead>
<tr>
<th>Replace this</th>
<th>With this</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOCKET = 210</td>
<td>Replace “210” with the socket or port number that the remote Z-server listens on for search requests.</td>
</tr>
<tr>
<td>DATABASE = thedatabasename</td>
<td>Replace “thedatabasename” with the name of the remote database you want to access.</td>
</tr>
<tr>
<td>IPADDRESS = “123.123.123.123”</td>
<td>Replace “123.123.123.123” with the IP address of the remote Z-server you want to access. Include the quotations marks.</td>
</tr>
</tbody>
</table>

5 Use this table to edit the Z_ATOMS section:

6 If the Z-server requires a user name and password, enter the user name and password in the USERID and PASS fields.
7 Review the “SEARCHES” section of the configuration file you created. If necessary, use this table to edit the prefixes in the SEARCHES section:

<table>
<thead>
<tr>
<th>Prefixes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>gw (general keyword)</td>
<td>Use the prefixes that you defined for your keyword (field) and browse searches. If you need to modify these prefixes to match your standard, do not include the period (.) or underscore (_) characters.</td>
</tr>
<tr>
<td>ti (title browse)</td>
<td></td>
</tr>
<tr>
<td>au (author browse)</td>
<td></td>
</tr>
<tr>
<td>su (subject browse)</td>
<td></td>
</tr>
<tr>
<td>tw (title keyword)</td>
<td></td>
</tr>
<tr>
<td>aw (author keyword)</td>
<td></td>
</tr>
<tr>
<td>sw (subject keyword)</td>
<td></td>
</tr>
</tbody>
</table>

If necessary, delete or add search parameters to the SEARCHES section. Do not delete or change the order of any other part of the “.zcf” file.

8 Use this table to edit these fields for each prefix you include in the SEARCHES section:

<table>
<thead>
<tr>
<th>Replace this</th>
<th>With this</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEARCH_DESC =</td>
<td>Replace “General Keyword” with a logical description of this search that you will remember. Include the quotation marks.</td>
</tr>
<tr>
<td>“General Keyword”</td>
<td></td>
</tr>
<tr>
<td>SEARCH_SCAN =</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td>FALSE</td>
<td>• If the search type is a browse search, this value should be TRUE.</td>
</tr>
<tr>
<td></td>
<td>• If the search type is a keyword search, this value should be FALSE.</td>
</tr>
<tr>
<td>USE = 1035</td>
<td>Replace “1035” with the use attribute for this search type. (Contact the Z39.50 library for these values.)</td>
</tr>
<tr>
<td>STRUCTURE = 2</td>
<td>Replace “2” with the structure value from the Z-server for this search type. Structure determines whether or not it is phrase, key, or word search. (Contact the Z39.50 library for these values.)</td>
</tr>
<tr>
<td>TRUNCATION = 100</td>
<td>Replace “100” with the truncation value from the Z-server for this search type. Truncation determines whether or not users can search by entering only a portion of a complete search term. Most Z-servers support the “100” value, which means no truncation is allowed, and the “1” value, which means users can right-truncate their search terms. (Contact the Z39.50 library for these values.)</td>
</tr>
</tbody>
</table>

9 Repeat step 8 for each prefix you want to edit or create.

10 Save and exit the file.
Storing Another Library’s Z39.50 Configuration Information

You must tell Horizon where to find the Z39.50 configuration file you create for a library whose database you want to search. You do this by storing that information in the Table Editor.

To store another library’s Z39.50 configuration information

1. Open the z3950_server_configuration view.
   Horizon displays the List Z39.50 Server Configuration window.

2. Choose the configuration you want to change, or create a new configuration.
   Horizon displays the Edit Z39.50 Server Configuration window:

3. Complete these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the name of the library whose database you want to access.</td>
</tr>
<tr>
<td>Default Type</td>
<td>Enter the type of records the library stores (for example, enter “US_MARC”).</td>
</tr>
<tr>
<td>File</td>
<td>Enter the path and name of the database configuration (*.zcf) file for this library.</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>--------------</td>
<td>---------</td>
</tr>
<tr>
<td>Request Size</td>
<td>Enter the number of matching records you want the Z39.50 Server to return with each request. Horizon retrieves Z39.50 search results in batches. After the initial batch is returned, users can retrieve additional matches with the Resume button. This field lets you specify how many matches to return in each batch. (For example, enter “5” to retrieve up to five matches on the initial search request, and up to five matches on each subsequent retrieval until all matching records are retrieved.) You may want to increase or decrease the request size according to how quickly or slowly search results are returned, taking into account variations in network speed.</td>
</tr>
</tbody>
</table>

4 Save your changes.
Chapter 4

Indexing

This chapter explains how your Horizon system uses indexes to help you search for and display search results. It also explains how to create indexes from scratch.

- About Indexing 4-3
- Understanding Indexing in Horizon 4-3
- Creating Indexes from Scratch 4-7
- Setting Up a Keyword Index for Horizon Information Portal 4-49
- Creating a Multiple-Source Collation Key Index 4-77
- Applying Indexing Changes for French Databases 4-101
- Setting Up Horizon to Use 13-Digit ISBNs 4-102
About Indexing

This chapter explains how your Horizon system uses indexes to help you search for and display search results. This chapter also explains how to create several indexes from scratch. In addition, this chapter explains how to set up a keyword index for Horizon Information Portal.

Because indexes and indexing is highly technical, you must meet several requirements in order to create indexes. You must have this understanding or skills:

- A thorough understanding of the data and structure of your Horizon database.
- A thorough knowledge of the contents of MARC records.
- Advanced skills in using your SQL query tool to run queries and create data structures in your database.
- Advanced skills in using the Horizon Table Editor.

**IMPORTANT**

The Horizon system comes with a variety of default indexes. (To see a list of default indexes, open the mq_index view in the Table Editor.) In general, you will not need to change these indexes unless they do not serve your library's searching purposes. Use extreme caution as you change existing indexes—doing so changes the way searching works. If you have concerns, contact Customer Support to help you create indexes or change existing indexes.

Do not delete the existing Horizon “title” index.

This chapter explains these topics:

- Understanding Indexing in Horizon
- Creating Indexes from Scratch
- Setting Up a Keyword Index for Horizon Information Portal
- Creating a Multiple-Source Collation Key Index
- Applying Indexing Changes for French Databases
- Setting up Horizon to Use 13-Digit ISBNs

**Understanding Indexing in Horizon**

Horizon uses indexes to quickly retrieve records in your database that match your search results. An index in the Horizon database works conceptually like an index at the end of a book—it contains a word or phrase from the record you are searching for and a link to that record. Indexes make searching for records in your database much faster.

Horizon uses these indexes to build search options in Horizon staff searching. Search options display in the main Search window, and define what type of information you are searching for. (For example, Horizon has a “Title Keyword” search option to search for keywords in titles on the database.)
These are specific types of indexes that are represented as search options:

- **Keyword index.** This type of index lets users enter a keyword that Horizon has indexed from a title field, subject heading fields, content notes field, and so forth. In other words, this type of search finds a match for a keyword by comparing the search terms with a list of words that Horizon has compiled from MARC records or tables in the database. (For example, a title keyword search might compare search terms to data stored in all MARC title tags. As another example, a borrower name keyword search in Circulation might compare search terms to data stored in the borrower table.) In addition, you can set up a single search option based on multiple keyword indexes. This lets you search for MARC information that is in either authority-controlled or non-authority controlled subfields. When multiple records match the search term, Horizon displays a list of matches. This type of list is called a “closed” list.

- **Browse index.** This type of search option lets users access an alphabetical list of all titles, authors, subjects, or series in Horizon. The search term that users enter for this type determines which part of the alphabet displays. For this search option, Horizon displays an alphabetical list of record information with the arrow cursor pointing at the entry that most closely matches the search term. (For example, if you did a subject alphabetical search for the word “language,” you would see the first subject heading in the list starting with “language,” and an arrow would point to the closest match. However, you could scroll up and down the alphabetical list and browse through all subject headings on the system.) This type of browsable list is also called an “open” list.

- **Exact match search.** This type of index lets users enter a word or number (such as an LCCN or ISBN) that is directly tied to only one record on the database. (For example, every item in your library will probably have a unique barcode, so when you conduct a barcode search, Horizon immediately displays the bibliographic record without showing a browse list.) In order to get results for an exact match, the user must enter the exact number. Use an exact match index to search for social security numbers, barcodes, and other items for which there is usually one unique match in the database.

This is how Horizon uses indexes and search options when a user does a search in staff searching: The user chooses a search option (such as “Title Browse”) and enters search terms. From the search option, Horizon knows which index to search. This is because part of the search option includes an index definition. The index definition includes the name of the index table where the database stores the indexed data. This database table, powered by a piece of software called an index engine, finds and returns matching bib or authority records for the search and stores that data in the index table. Also from the search option, Horizon knows how the search results display in staff searching. This is because part of the search option definition is also a view definition to control what the search results window looks like. All these processes work together as your staff search for and display search results.

This process is illustrated in these two diagrams:
Example of Using a Title Browse Index

1. In the Search window in staff searching, a staff member chooses the “Title Browse” search option, enters search terms, and clicks OK.

2. Part of the “Title Browse” search option definition is an index definition.

3. Part of the “title” index definition is the name of the index table on the database where the indexed data is stored.

4. The “title” index table in the database extracts and stores a sequence of records.

5. Part of the “Title Browse” search option definition is also a view definition for the search results display.

6. The Titles list shows the results of the staff member’s search.
Example of Using a Title Keyword Index

1. In the Search window in staff searching, a staff member chooses the "Title Keyword" search option, enters search terms, and clicks OK.

2. Part of the "Title Keyword" search option definition is an index definition.

3. Part of the definition for each index is the name of the index table on the database where the indexed data is stored.

4. The title keyword index table in the database extracts all matching records.

5. Part of the "Title Keyword" search option definition is also a view definition for the search results display.

6. The Titles list shows the results of the staff member's search.
Creating Indexes from Scratch

If the default indexes included with Horizon do not meet the needs of your library, you can create an index from scratch. (For example, you may want to create a new keyword index.) When you create an index from scratch, you do all the necessary tasks on the database and in the Horizon user interface to set up and use the index to search for and display data.

Regardless of the type of index you create, you do these general tasks in this order:

1. Create database objects for the index.
2. Create a MARC map to use with the index.
3. Create an index definition in the Table Editor.
4. Create a view definition for the index.
5. Add the new index definition to your search options.
6. Populate the index.

IMPORTANT

If you are unsure about how to do any of the steps in this section, Customer Support can create the index for you for an add-on service fee. To have a new index created for you, contact your Customer Sales Representative for a price quote.

This section explains just two of the many types of indexes that you can create on Horizon. This section explains how to create a certain type of browse index, called a collation key index, which lets you sort and display Unicode characters. This section also explains how to create a keyword search index. The instructions give sample scenarios of the types of keyword indexes you can create.

This section explains these topics:

- Creating a Collation Key Index
- Creating a Keyword Search Index

Creating a Collation Key Index

A collation key index is a type of browse index. (A browse index lets you search for words at the beginning of any string in a MARC record.) Horizon provides two ways to create a browse index. You can create an alpha browse index, or you can create a collation key index. An alpha browse index lets you use the codepage of your database to handle the characters that the index needs to sort and display. (The Horizon database codepage is limited to 256 characters.) A collation key index, however, is not limited to use the codepage of the database—it lets you use Unicode to sort and display characters. (Unicode lets you sort and display over 40,000 characters.) In addition, a collation key index lets you sort and display titles in languages that are not supported by MARC, such as Tibetan.
This diagram illustrates some of the different languages that each type of browse index can handle:

<table>
<thead>
<tr>
<th>Alpha Browse index</th>
<th>Collation Key index</th>
</tr>
</thead>
<tbody>
<tr>
<td>For example, an Alpha Browse index sorts, displays, and indexes titles from western European languages:</td>
<td></td>
</tr>
<tr>
<td>• English</td>
<td></td>
</tr>
<tr>
<td>• French</td>
<td></td>
</tr>
<tr>
<td>• German</td>
<td></td>
</tr>
<tr>
<td>• Italian</td>
<td></td>
</tr>
<tr>
<td>• Spanish, and so forth</td>
<td></td>
</tr>
<tr>
<td>For example, a Collation Key index sorts, displays, and indexes titles from these languages, among others:</td>
<td></td>
</tr>
<tr>
<td>• Arabic</td>
<td></td>
</tr>
<tr>
<td>• Bengali</td>
<td></td>
</tr>
<tr>
<td>• Cyrillic</td>
<td></td>
</tr>
<tr>
<td>• English</td>
<td></td>
</tr>
<tr>
<td>• French</td>
<td></td>
</tr>
<tr>
<td>• German</td>
<td></td>
</tr>
<tr>
<td>• Greek</td>
<td></td>
</tr>
<tr>
<td>• Italian (and all other Western European languages)</td>
<td></td>
</tr>
<tr>
<td>• Japanese</td>
<td></td>
</tr>
<tr>
<td>• Korean</td>
<td></td>
</tr>
<tr>
<td>• Tibetan</td>
<td></td>
</tr>
<tr>
<td>• Gujarati</td>
<td></td>
</tr>
</tbody>
</table>

You can create collation key indexes to index bib or authority information. In addition, you can create a single or multiple tag collation key index. A single tag index retrieves and indexes data from only one tag in a MARC record. For this type of index, Horizon uses the first tag in a hierarchy of tags in the MARC map to know the tag to retrieve and display. A multiple tag index retrieves and indexes data from all specified tags in a MARC record. You can make any browse index that you create a collation key index.

As you do steps in this section, you use information or codes (such table names and MARC map codes) that you create in one task for subsequent tasks. Because of this, you may want to write down codes as you create them. You do some of the tasks in this section in your SQL query tool. Other tasks you do in the Horizon Table Editor.

**IMPORTANT**

You should create a collation key index from scratch only if you are completely comfortable creating and running SQL scripts to create data structures. If you are unsure about any of the steps in this section, Customer Support can create the index for you for an add-on service fee. To have a new index created for you, contact your Customer Sales Representative for a price quote.

**IMPORTANT**

Do not delete the existing Horizon “title” index. Your collation key indexes cannot work without this Horizon index.
You create a collation key index by completing these tasks in this order:

1. Create database objects for the index.
2. Create a MARC map to use with the index.
3. Create an index definition in the Table Editor.
4. Set up browse scoping support, if desired.
5. Create a view definition for the index.
6. Add the new index definition to your search options.
7. Populate the new index.

NOTE

This section explains how to create only a collation key index. If you want to create an alpha browse index, see “Creating a Single Alphabetical or Single Keyword Search Option” on page 3-13.

Creating Database Objects for the Index

You run an SQL script to create database objects for the index. Depending on what kind of collation key index you are creating (single or multiple tag per record, or authority or bib), you will run an SQL script to create database objects necessary for the index to work. Before you run the script, you need to make changes to the script for your specific table name. You need to change the table name in the script to the name of the table you are creating for your database.

NOTE

You complete all the steps in this task using your SQL query tool. Make sure to watch for errors as you run your query.

To create database objects for the index

1. Open your SQL query tool.
2. Connect to your Horizon database.
3. From your Horizon installation CD, copy and paste the three SQL text files in the **Utils** directory to your hard drive.
4. In your SQL query tool, open one of the SQL text files:

<table>
<thead>
<tr>
<th>If you are creating this type of index</th>
<th>Open this file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single tag authority index</td>
<td>SingleTagAuthColKeyIndexTemplate.SQL</td>
</tr>
<tr>
<td>Single tag bib index</td>
<td>SingleTagBibColKeyIndexTemplate.SQL</td>
</tr>
<tr>
<td>Multiple tag bib index</td>
<td>MultiTagBibColKeyIndexTemplate.SQL</td>
</tr>
</tbody>
</table>

This is the query that will create the necessary database objects for your new index.

5. Search for all instances of the dollar sign (\$) character and replace them with the name of your new table.
(For example, if you are creating a vernacular titles browse index, you may want to name your table vn_title.)

**NOTE**

In this step, you are putting your table name in the script, so when you run it, your database will create the new table, including the columns, triggers, and a stored procedure for the new index. You may also want to make a note of this table name because you will need to use this table name in subsequent tasks.

6. Execute the query.
7. Run a query to verify that you created the new index table.
   For example, run this query:
   ```sql
   select * from vn_title
   ```

**Creating a New MARC Map for the Index**

Because collation key indexes extract MARC information, you must use a MARC map as part of the index definition. Depending on the kind of index you are creating, you may already have a MARC map defined to use for the new index. If you do not, you need to create a new MARC map for the index. You need to understand MARC mapping and MARC records in order to do this. (For more information on MARC maps, see “MARC Maps” on page 2-93.)
To create a new MARC map for the index

**View:** marc_map  
**Process:** Administration\Index Control Menu\MARC Map Table

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Marc_map Code | Enter the code that identifies the MARC map.  
(For example, if you are creating a MARC map to extract vernacular titles, your MARC map may be “vntitle”.)  
**IMPORTANT**  
Assign this MARC map an “s” prefix for bib based indexes or an “x” for authority based indexes. This distinguishes it from other MARC maps. |
| Description   | Enter a description of the MARC map.  
(For example, if you are creating a MARC map to extract vernacular titles, your description may be “Vernacular Titles”.) |
| Search Limit? | Leave this box unmarked.  
Horizon uses this setting for search limiting MARC maps. |
| Sort Filter   | Leave the No Filter button marked. |
### In this field | Do this
---|---
Run-on | Do one of these options:
- If you are creating a multiple tag index and you do not want the tags you extract to run together, leave the **Do Not Run-on** option marked.
- If you are creating a multiple tag index and you do want the tags you extract to run together, mark the **Do Run-on** option.
- If you are creating a single tag index, leave the **Do Not Run-on** option marked.

**NOTE**
When you create the index definition, you will mark the One Tag only box to specify that Horizon will only extract and index only the result of the first tag. (For more information, see “Creating the Index Definition in the Table Editor” on page 4-15.)

> For example, if you are setting up a MARC map for vernacular titles, you may want to extract data from the 880 tag, subfields a, b, n, and p, only if it has a value of 245—starting in position 0 and going for a length of 3 characters—in subfield 6.

### In this field | Do this
---|---
Tag | Enter the tag you want the MARC map to extract information from.
(For example, if you are creating an indexing MARC map to extract vernacular title information, you might enter “880” as the tag.)

Part | Enter the subfields or positions of the tag you want MARC map to extract information from.
(For example, if you are creating an indexing MARC map to extract vernacular title information, you might enter “abnp” as the subfields.)
### Creating Indexes from Scratch

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| **Conditional Part**| If you want to set a condition on the tag you are extracting, enter which part (subfield or fixed field position) must contain the conditional value in order for Horizon to extract any of the information in the specified tag.  
(For example, if you are creating a MARC map for vernacular titles, you may specify that subfield 6 of tag 880 must have a value of 245 in positions 0 through 3. In this case, you would enter “245” in this field.) |
| **Conditional Value**| If you want to set a condition on the tag that you are extracting, enter the value the conditional part (subfield or fixed field position) must contain in order for Horizon to extract the MARC information.  
(For example, if you are creating a MARC map for vernacular titles, you may specify that subfield 6 of tag 880 must have a value of 245 in positions 0 through 3. In this case, you would enter “6/0.3” in this field.) |
| **First Tag: Prefix**| Leave this field blank.                                                                                                                                                                               |
| **Suffix**          | Leave this field blank.                                                                                                                                                                               |
| **Other Tags: Prefix**| Leave this field blank.                                                                                                                                                                                |
| **Suffix**          | Leave this field blank.                                                                                                                                                                               |
| **HTML Format**     | Leave this field blank.                                                                                                                                                                               |
| **Distinct Subfields**| Do one of these options:  
• If you want Horizon to treat all subfields as one entry, leave this box unmarked.  
• If you want Horizon to treat each subfield in the extraction tag as a separate entry in the index or as a separate line in your display, mark this box.  
You mark this option only if you are setting up a multiple tag index and used the multiple tag SQL script to create your database objects. (For more information about this script, see “Creating Database Objects for the Index” on page 4-9.)  
This option is specifically for Indexing and Display MARC maps. (For example, this feature lets you make full use of the enhanced content notes in the 505 tag.)  

**NOTE**  
If you mark this option, you **must** make sure the Do Not Run-on option is also marked in the Run-on field for this MARC map. |
NOTE

Complete the fields in the Conditional group only if you need to set conditions for the entire MARC map. (For information on when to use this group, see “Understanding Conditional Parts of a MARC Map” on page 2-81.)

<table>
<thead>
<tr>
<th>In this field in the Conditional group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opening Paren.</td>
<td>If you are grouping several conditions in this MARC map together, enter a left parenthetical mark in the first entry for the group.</td>
</tr>
<tr>
<td>Tag</td>
<td>Enter the tag you are setting up as the conditional tag.</td>
</tr>
<tr>
<td>Part</td>
<td>Enter the subfields or positions of the conditional tag you want the MARC map to extract information from.</td>
</tr>
<tr>
<td>Value</td>
<td>Enter the value that the conditional part (subfield or position) must contain in order for Horizon to extract any of the MARC information specified for the entire MARC map.</td>
</tr>
<tr>
<td>Closing Paren.</td>
<td>If you are grouping several conditions in this MARC map together, enter a right parenthetical mark in the last entry for the group.</td>
</tr>
</tbody>
</table>
Creating the Index Definition in the Table Editor

You create an index definition for the collation key index you are creating. This definition controls how the data is stored, what database table column stores the sorted data, the name of the index, and so forth. Once you create this index definition, you assign the index to a search option that displays in staff searching.

To create the index definition in the Table Editor

**View:** mq_index  
**Process:** Administration\Index Control Menu\Indexes
<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Mq Index               | Enter a code for the index.  
This is the code you assign to a specific search option.  
(For example, if you are creating an index for vernacular titles, you may enter “vntitle.”) |
| Description            | Enter a description for the index.  
(For example, if you are creating an index for vernacular titles, you may enter “Browse Vernacular Titles”.) |
| Index Table            | Enter the name of the index table you created on the database.  
This is the table that will store the data. This is the index table you created by running the SQL script. (For more information, see “Creating Database Objects for the Index” on page 4-9.) |
| Sort Col.              | Enter “sort_weight” as the sort column.  
This is the column in the new table that sorts the data. |
| Base Table             | Enter the source table for the raw data (the data you want to index).  
Typically, this will be either the bib or auth table depending on the type of MARC information you want to index. |
| Base Index Col.        | Enter “text”.  
This is the column in either the auth or bib table where the index finds the raw data.  
You use the text column because it is the column in MARC-based tables that contains the text of the MARC tags and subfields. |
| Key Col.               | Do one of these options:  
- If the MARC information you want to index is in the bib table, enter “bib#”.  
- If the MARC information you want to index is in the auth table, enter “auth#”.  
This column is the link from the index to the source record that is indexed. |
### In this field or group | Do this
---|---
marc_map | Do one of these options:  
- If you created a new MARC map for the index, enter the code of the MARC map.  
  (For instructions, see “Creating a New MARC Map for the Index” on page 10.)  
- If you did not create a new MARC map for the index, enter the code for one of the existing MARC maps.  
  A MARC map “tells” Horizon what subfields to pull from which tags under specific conditions for processing and inserting the data into the index table.

One Tag Only | Do one of these options:  
- If you are creating a multiple tag index, leave this box unmarked.  
- If you are creating a single tag index, mark this box.  
  When you mark this, Horizon extracts and indexes only the result of the first tag in the MARC record.

Ignore Spacer for Indexing | Leave this box unmarked.

Show Author | Mark this option only if you are creating an authority-based index for authors.

Show Subject | Mark this option only if you are creating an authority-based index for subjects.

Show Series | Mark this option only if you are creating an authority-based index for series.

Index Type | Choose the **Collation-Key** option.  
The index type controls what algorithm Horizon uses as it indexes.

Processor | Enter the “UcSrtWt” processor.  
Horizon uses this processor for unicode browse indexes.
## Chapter 4: Indexing

### Display Type

**Staff-Only.** This displays only records with the Staff Only flag checked.

**Public-Only.** This displays only records with the Staff Only flag cleared.

**Combined.** This displays both staff-only and public-only records.

- **NOTE:**
  
  The Staff-Only option is useful only if your library has public-only indexes defined. This is because both staff-only and combined indexes contain staff-only records. Only public only entries filter out the staff-only records.

### Queue

Enter a “0” (zero) in this field.

Horizon uses this value in Deferred Indexing. (For more information, see “Understanding Deferred Indexing” in the *Cataloging Setup Guide*.)

### Stop Queue’s Indexer

Leave this box unmarked.

Horizon uses this value in Deferred Indexing.

### Sort Width

Enter the number of bytes or characters on the database you want Horizon to sort.

If you used an SQL script to create your index table on the database, you should enter 250. (For more information on the SQL script, see “Creating Database Objects for the Index” on page 4-9.)

- **IMPORTANT:**

  You must enter a value in this field, or the index will not work.
Creating Indexes from Scratch

Creating Indexes from Scratch

Setting Up Browse Scoping Support for HIP 4.X

Horizon 7.4 and HIP 4.0 and above provide enhanced support to the Horizon Information Portal browse scoping feature. Browse scoping lets you limit the display of searching results. Information Portal requires break points for browse scoping in order to efficiently process and return results. You must specify browse scoping break points for the browse scoping feature to be available for any indexes in Information Portal.

In previous versions of Information Portal, browse scoping data was stored on the Information Portal database. With the release of HIP 4.0 with Horizon 7.4, this information is stored in tables on the Horizon database. In addition, Horizon uses a Day End process that populates and updates these new tables on the Horizon database. When you run this Day End process, it will create Browse Scope Break Points for each index for which you marked the HIP Browse Scoping check box in the mq_index view. (HIP 3.09, and higher 3.x versions, continue to rely on the HIP database for browse scoping and the following instructions do not apply to customers with the 3.x series.)

You can only create browse scope break points for indexes with 'auth' or 'bib' as the base table. In addition, you can only create browse scope break points for alpha or multi-source indexes.

This section explains these topics:

- Setting Up Browse Scoping for an Index
- Setting Up the DEBrScop Day End Process

Setting Up Browse Scoping for an Index

You can only create browse scope break points for indexes with 'auth' or 'bib' as the base table. In addition, you can only create browse scope break points for alpha indexes.

To set up browse scoping for an index

1. Open the mq_index view.
2. Choose the index for which you want to create browse scope break points.
   - You can only create browse scope break points for indexes with 'auth' or 'bib' as the base table. In addition, you can only create browse scope break points for alpha or multi-source indexes.
   - Horizon displays the Edit Horizon Index Definitions window:
3. Mark the HIP Browse Scoping check box if you want to create browse scope break points for this index.
4. Save your changes.
5. Repeat steps 1-4 for additional indexes for which you want to create browse scope break points.
Chapter 4: Indexing

Setting Up the DEBrScop Day End Process

The Day End process “HIP Browse Scope Break Points” (DeBrScop) populates Horizon database tables with browse scoping data. When you run this Day End process, it will create or update Browse Scope Break Points for each index for which the HIP Browse Scoping checkbox in the mq_index view is marked.

NOTE

The Horizon 7.4 upgrade delivered the DeBrScop Day End process as an inactive process. If you want to run it with your Day End suite, you need to add it as an option to the MDayEnd menu. In addition, the process is automatically configured to run weekly on Saturday (/w6). If you want, you can set this process to run on a different day of the week, or to run daily or monthly by changing the process argument for the Day End process.

Creating a View Definition for the Index

You create a view definition for the index in the Table Editor. The view definition lets data that you have indexed display in a window in Horizon. The view definition defines how, when, and where the indexed data displays in the Horizon window. A view definition defines the table where the data comes from, where in the Horizon processes the data displays (for example, the Table Editor or staff searching). In addition, the view definition determines if staff can modify or add data in the view. It also specifies how Horizon sorts data in list window columns when users or staff click the Sort button.
To create a view definition for the index

**View:** mq_view  
**Process:** Administration\System Setup\View Control

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Mq view                | Enter a name for the new view.  
You should give the view a name that represents the data the Horizon window will display. (For example, if you are creating a window to display vernacular titles in staff searching, you may name the view “vn_title_list”.) |
| **IMPORTANT**           |         |
|                        | If the view you are creating displays data from the auth table, this is the format you must use for the view code in this field:  
openauth_index code  
This is the code you gave the index definition. (For more information, see “Creating the Index Definition in the Table Editor” on page 4-15.) |
| Description            | Enter a description of the view.  
(For example, if you are creating a vernacular titles list, you may enter “Vernacular Titles List”.) |
| View Type              | Choose one of these options to specify where in Horizon this window displays.  
- **Title Alphabetical.** Choose this type if the view you are creating displays data from the bib table.  
- **Authority List.** Choose this type if the view you are creating displays data from the auth table. |
### Chapter 4: Indexing

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>Enter the name of the index table where data that you want to display is stored in the database. This is the table that will store the data. This is the index table you created by running the SQL script. (For more information, see “Creating Database Objects for the Index” on page 4-9.)</td>
</tr>
<tr>
<td>Window Title</td>
<td>Enter a title for the window. You should give the window a title that represents the type of information displayed. (For example, you could enter “Browse Vernacular Titles”.)</td>
</tr>
<tr>
<td>Help panel id</td>
<td>Leave this field blank.</td>
</tr>
<tr>
<td>Properties</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you are creating a browse index, mark the <strong>Slice</strong> box. This option specifies that the window displays only a slice or portion of the entire list that you can browse.</td>
</tr>
<tr>
<td></td>
<td>• If you are creating an authority-based index, mark the <strong>Slice</strong> and <strong>Xrefs</strong> boxes. The Slice option specifies that the window displays only a slice or portion of the entire list that you can browse. The Xrefs option specifies that <em>see</em> and <em>see also</em> references display in the list.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> Make sure <em>none</em> of the other Properties boxes are marked.</td>
</tr>
<tr>
<td>Secured</td>
<td>Leave this field blank.</td>
</tr>
</tbody>
</table>

Click New to create new column entries for any additional columns from the index table that you want to display in the list window. (For example, if you could create an entry for the publication date.) If additional column entries to this view definition display MARC data, you must assign a MARC map to those columns.

You must create a column entry for the “original” column from the index table in this view.
### Creating Indexes from Scratch

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column Name</td>
<td>Enter “original.” This is the name of the column from the index table where the indexed data is stored.</td>
</tr>
<tr>
<td>Ord</td>
<td>Enter the order you want the data in this column to display in the window in Horizon.</td>
</tr>
<tr>
<td>Column Label</td>
<td>Enter the name you want to display as this column label in the list window.</td>
</tr>
<tr>
<td>No. of Display Characters</td>
<td>Enter the number of characters of the column data you want to display.</td>
</tr>
<tr>
<td>Pad Character</td>
<td>Leave this box unmarked.</td>
</tr>
<tr>
<td>Properties</td>
<td>Mark the <strong>Displayed</strong> box to display data from this column in the window by default.</td>
</tr>
<tr>
<td>MARC Map</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• For the “original” column entry, leave this field blank.</td>
</tr>
<tr>
<td></td>
<td>• If you are setting up additional columns that display MARC data, enter or choose a code for a MARC map for each column.</td>
</tr>
<tr>
<td></td>
<td><strong>IMPORTANT</strong></td>
</tr>
<tr>
<td></td>
<td>If you create any browse index from scratch, regardless of whether it is a collation key or any other type of browse index, you must make sure that you add a MARC-mapped column to the view definition for the index.</td>
</tr>
<tr>
<td>Sort Processor</td>
<td>Enter “none” as the sort processor.</td>
</tr>
</tbody>
</table>

**IMPORTANT**  
You must create a column entry for the “original” column from the index table in this view.
Chapter 4: Indexing

Adding the New Index Definition to Your Search Options

Now that you have created an index, index definition, and a view definition for the window that displays the data, you can add the new index definition as a new search option in staff searching. When you create a search option for the index, you provide accessibility to the indexed data. In

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**NOTE**
If you are creating an authority-based collation key index, you must add these columns in addition to the “original” column: “n_bibs,” “see_flag,” and “see_also_flag.” Horizon requires these columns as part of the view definition in order to display an open authority list in staff searching.
addition, you also assign a view to the search option to display the indexed data. Once you create a search option for the index, the search option will display in the main search window in staff searching.

To add the new definition to your search options

**View:** search  
**Process:** Searching\PAC Control Menu\Search Option Table

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Enter the code for staff searching for this search option. The code for staff search options <em>must</em> be the same as the PAC flavor where this search displays.</td>
</tr>
<tr>
<td>Index No.</td>
<td>Enter a number to specify the order in which this search option displays in the main search window in staff searching. The search options can appear in any order, but each search option in a specific PAC flavor must have a unique number. The default numbers start at 30 and increase in increments of five or ten. This lets you add additional search options before the default set or between entries in the default set as needed.</td>
</tr>
<tr>
<td>Label</td>
<td>Enter a descriptive name for the search option. This is the label that displays for the search option in the main search window. You should use a name that your library staff understands. (For example, if you are setting up a vernacular titles search option, you might enter “Vernacular Titles Browse”.)</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Mq Index</td>
<td>Enter the Horizon index you created for the index. (For more information, see “Creating the Index Definition in the Table Editor” on page 4-15.)</td>
</tr>
<tr>
<td>This index contains</td>
<td>Enter the help text that you want to display for the search option in the main search window. (For example, for a vernacular titles browse search option, you might enter “Vernacular list of titles”.)</td>
</tr>
<tr>
<td>Example 1</td>
<td>Enter an example of a search string a user might enter for this search option. Users can view this example by clicking the Example button in the main search window.</td>
</tr>
<tr>
<td>Describe example 1</td>
<td>Enter a description of the search results for example 1. (For example, the text for a vernacular title browse search option might be “To display the vernacular title list”.)</td>
</tr>
<tr>
<td>Example 2</td>
<td>Enter another example of a search string a user might enter for this search option. Users can view this example by clicking the Example button in the main search window.</td>
</tr>
<tr>
<td>Describe example 2</td>
<td>Enter a description of the search results for example 2.</td>
</tr>
<tr>
<td>Display View</td>
<td>Enter the view that displays the search results. This is the view that displays the data. (For more information on the view you created, see “Creating the Index Definition in the Table Editor” on page 4-15.)</td>
</tr>
<tr>
<td></td>
<td><strong>IMPORTANT</strong> You must enter a view in this field, or the index will not work.</td>
</tr>
<tr>
<td>Z39.50 Use Attr.</td>
<td>If you are setting up your database so Z39.50 server-compliant clients can search it, enter the Z39.50 use attribute. This assigns the search attribute to the search option.</td>
</tr>
</tbody>
</table>
Populating Your New Index Using ReIndex

You use the ReIndex utility to populate your new index table with data. You download this utility from the Products/Horizon/Downloads/Upgrades page on the SirsiDynix customer web site at “clientcare.sirsidynix.com”. You run ReIndex from a command prompt. Before you run it, you add command-line arguments or “switches” to the ReIndex executable to set the type of index and the Horizon index code that your database builds.

To populate your new index using ReIndex

1. Close any running Horizon applications.
2. At a command prompt, go to the directory on the workstation where you downloaded the ReIndex executable.
3. Run this command to display a list of valid switches you can add to ReIndex:

   ```
   ReIndex.exe /?
   ```

   **NOTE**
   You must enter a space before the slash (/) character.

   The Command Prompt displays these parameters:

   ```
   C:\NzUtil>ReIndex.exe /?
   ReIndex u7.2 06/27/2002
   Required:
   /s<Server> /p<Password> /u<User> /d<Database>
   /M<enum type> 1 = do bib, 2 = do auths
   Optional:
   /D<Database Client> <MYSQL|Sybase>
   /I<index name> <comma delimited list>
   /A<beginkeyNum> /E<endkeyNum>
   /T<tablename> (w/key numbers, default: auth_control/bib_control)
   Use /E and /B with or w/o /T
   /X don't delete before re-indexing (default is to delete)
   IMPORTANT: Do not attempt to run other Horizon applications on this workstation while 'ReIndex' is running...
   You can cause subtle, hard-to-fix corruption!
   ```

4. Enter one of these options at the command prompt, followed by any optional switches you want to use:

   - If the index you want to build is bib-based, enter this command:
     ```
     ReIndex.exe /s<server> /p<password> /u<user> /d<database> /d1 /i<indexcode>
     ```
   - If the index you want to build is authority-based, enter this command:
Chapter 4: Indexing

ReIndex.exe /server /password /user /database /m2 /i/indexcode

**Note**

The index code you enter in the “i” switch is the code you gave the index definition in the Table Editor in a previous step. (For more information, see “Creating the Index Definition in the Table Editor” on page 4-15.)

**Note**

Depending on how many records you are building in your index, the ReIndex process may take a long time.

Creating a Keyword Search Index

This section explains how to create a new keyword search index for your Horizon system. A keyword search index links each word in a MARC tag to the bib number of the record that the word is in. This lets users find any MARC record that contains any word or set of words anywhere in a string of characters.

As you do steps in this section, you use information or codes (such as table names and MARC map codes) that you create in one task for subsequent tasks. Because of this, you may want to write down codes as you create them. You do some of the tasks in this section in your SQL query tool. Other tasks you do in the Horizon Table Editor. In addition, this section provides several SQL queries that you can run to display a “template” or sample of the command you need to run to create new database objects.

Some tasks in this section focus on scenarios for setting up specific types of keyword search indexes. (For example, one task focuses on one specific index scenario, such as a title keyword search. Another task may focus on a different scenario, such as a subject keyword list.) These scenarios are only examples of a type of keyword index you may want to create.

**Important**

You should create a keyword search index from scratch only if you are completely comfortable creating and running SQL scripts to create data structures. If you are unsure about any of the steps in this section, Customer Support can create the index for you for an add-on service fee. To have a new index created for you, contact your Customer Sales Representative for a price quote.

You create the new index by completing these tasks in this order:

1. Create an index table.
2. Create the SQL indexes for the index table.
3. Create triggers.
4. Grant permissions on the index table for public and staff.
5. Add a word table entry for the index.
6. Create a MARC map for the index.
7 Create a index definition for the index.
8 Create an view definition to display search results.
9 Add the new index definition to your search options.
10 Populate the new index.

Creating an Index Table
You create a data table on your database that stores the link between the word and bib record.

NOTE
You complete the steps in this task using your SQL query tool. Make sure to watch for errors as you run queries.

To create an index table
1 Use an sp_help command on an existing table to determine the design or template you want for your new table.
   For example, executing sp_help on the titlKW_word table produces this output:

<table>
<thead>
<tr>
<th>Name</th>
<th>Owner</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>titlKW_word</td>
<td>dbo</td>
<td>user table</td>
</tr>
<tr>
<td>Data_located_on_segment</td>
<td>When_created</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Column_name</th>
<th>Type</th>
<th>Length</th>
<th>Prec</th>
<th>Scale</th>
<th>Nulls</th>
</tr>
</thead>
<tbody>
<tr>
<td>bib#</td>
<td>int</td>
<td>4</td>
<td>NULL</td>
<td>NULL</td>
<td>0</td>
</tr>
<tr>
<td>word#</td>
<td>int</td>
<td>4</td>
<td>NULL</td>
<td>NULL</td>
<td>0</td>
</tr>
</tbody>
</table>

2 Use an SQL command to create the index table.
   For example, run this command:
   `create table vtitleKW_word(bib# int, word# int)`

Creating the SQL Indexes for the Index Table
You must create the necessary SQL indexes for the new index table. SQL indexes speed up the indexing of records in the database. You may need to create several SQL indexes for the index table.

NOTE
You complete the steps in this task using your SQL query tool. Make sure to watch for errors as you run queries.
To create the SQL index for the index table

1. Use an `sp_helpindex` command on an existing table to determine the SQL indexes you need to create for the new table.

   For example, executing the `sp_helpindex titlekw_word` command produces this output:

<table>
<thead>
<tr>
<th>index_name</th>
<th>index_description</th>
<th>index_keys</th>
</tr>
</thead>
<tbody>
<tr>
<td>titlKW_word_word_index</td>
<td>clustered, unique located on default</td>
<td>word#, bib#</td>
</tr>
<tr>
<td>titlKW_word_bib#_index</td>
<td>nonclustered located on default</td>
<td>bib#</td>
</tr>
</tbody>
</table>

2. Use the `create index` command to create one clustered index.

   This SQL index defines how the database orders entries in the new table.

   For example, run this command:
   ```sql
   create index bib_item_bib#_index on bib_item(bib#)
   ```

3. Create the additional non-clustered SQL indexes necessary for the index table.

Creating Necessary Triggers

You need to create three triggers to control updates to entries and deletions from the new index table. You can make these new triggers identical to the triggers in your template table. (This is the table you used as a sample or template when you created your new index table. For more information, see “Creating an Index Table” on page 4-29.)

To create the triggers, you run a query that gives you an example or template for the query you want to create, then you search for and replace the trigger name in the template with a new trigger name. In addition, if you have a Sybase database and you use a template to execute the queries, you need to remove the carriage return that Sybase puts after every 250 characters. Finally, you execute the new query to create the trigger.

```
NOTE
You complete all the steps in this task using your SQL query tool. Make sure to watch for errors as you run queries.
```

This section explains these topics:

- Creating the Delete Trigger
- Creating the Insert Trigger
- Creating the Update Trigger
Creating Indexes from Scratch

To create the delete trigger

1. Use this command to display a template for the delete trigger:
   
   ```sql
   sp_helptext table_d_trig
   ```

   For example, `sp_helptext titlKW_word_d_trig` produces this output:
   ```sql
   /**************************************************************************
   Copyright (C) 2008 SirsiDynix All rights reserved.
   /**************************************************************************
   create trigger titlKW_word_d_trig
   on titlKW_word
   for delete
   as
   update word
   set n_titlkws = n_titlkws - 1
   from word w, deleted d
   where w.word# = d.word#
   and w.n_titlkws > 0
   return
   ```

   Sybase puts a carriage return after 250 characters. You need to remove this carriage return before you run the query.

2. Search for your template’s trigger name (for example, “titlKW_word_d_trig”) and replace it with the name of the delete trigger for your new table (for example, “vtitlKW_word_d_trig”).

3. Copy the text from the template results window to a new session window.

4. If you have a Sybase database and you are using a template to execute the queries, delete the carriage return that Sybase puts after every 250 characters. You can see a carriage return if a line suddenly displays left justified.

5. Execute the query.
   Your SQL tool creates the new trigger.

To create the insert trigger

1. Use this command to display a template for the insert trigger:
   ```sql
   sp_helptext table_i_trig
   ```
For example, \texttt{sp\_helptext titlkw\_word\_i\_trig} produces this output:

```
/*
 * Copyright (C) 2008 SirsiDynix All rights reserved.
 */
create trigger titlKW_word_i_trig
on titlKW_word
for insert
as
  update word
  set n\_titlkws = n\_titlkws - 1
  from word w, deleted d
  where w\_word\# = d\_word\#
  and w\_n\_titlkws > 0
return
```

Sybase puts a carriage return after 250 characters. You need to remove this carriage return before you run the query.

2. Search for your template’s trigger name (for example, “titlKW\_word\_i\_trig”) and replace it with the name of the insert trigger for your new table (for example, “vtitlKW\_word\_i\_trig”).

3. Copy the text from the template results window to a new session window.

4. If you have a Sybase database and you are using a template to execute the queries, delete the carriage return that Sybase puts after every 250 characters.

   You can see a carriage return if a line suddenly displays left justified.

5. Execute the query.

6. Your SQL tool creates the new trigger.

\textbf{To create the update trigger}

1. Use this command to display a template for the update trigger:

   \texttt{sp\_helptext table\_u\_trig}

   For example, \texttt{sp\_helptext titlkw\_word\_u\_trig} produces this output:

   ```
   /*
   * Copyright (C) 2008 SirsiDynix All rights reserved.
   */
   create trigger titlKW_word_u_trig
   on titlKW_word
   for update
   as
     update word
     set n\_titlkws = n\_titlkws - 1
     from word w, deleted d
     where w\_word\# = d\_word\#
     and w\_n\_titlkws > 0
   return
   ```

   Sybase puts a carriage return after 250 characters. You need to remove this carriage return before you run the query.

2. Search for your template’s trigger name (for example, “titlKW\_word\_u\_trig”) and replace it with the name of the update trigger for your new table (for example, “vtitlKW\_word\_u\_trig”).
Creating Indexes from Scratch

3 Copy the text from the template results window to a new session window.

4 If you have a Sybase database and you are using a template to execute the queries, delete the carriage return that Sybase puts after every 250 characters.
   You can see a carriage return if a line suddenly displays left justified.

5 Execute the query.

6 Your SQL tool creates the new trigger.

Granting Permissions on the Index Table for Public and Staff

You need to grant select (search only) permissions on the new index table for public users. This lets public users search using the new index table. In addition, you grant select, insert, update, and delete permissions on the new table for staff. This lets staff, specifically Cataloging staff, create and delete records stored in the new index table.

NOTE
You complete all the steps in this task using your SQL query tool. Make sure to watch for errors as you run queries.

To grant permissions on the index table for public and staff

1 Use this command to list your user accounts:
   sp_helpuser

2 Use this command to list your user group accounts:
   sp_helpgroup

3 Use this command to grant select permissions for public users and groups:
   grant select on table to user(s) or group
   For example, enter this command:
   grant select on titlKW_word to PACGROUP

4 Use this command to grant staff permissions:
   grant all on table to user(s) or group
   For example, enter this command:
   grant all on titlKW_word to STAFFGROUP
Adding a Word Table Entry for the Index

You must add an entry in the word table for the new index. This new entry in the word table records how many times the word exists in the index you are creating.

To add a word table entry for the index

In your SQL query tool, use the `alter table` command to create the entry in the word table:

```
alter table word add n_unique_identifier_namekws zero_int NULL
```

Typically, the unique identifier is the index table name.

For example, enter this command:

```
alter table word add n_vtitleKWS zero_int NULL
```

Creating a MARC Map for the Keyword Index

You create a MARC map to control what tags and subfields Horizon indexes in this new keyword search. You may already have a MARC map on your Horizon system that you can use for this new keyword index.

**NOTE**

This section contains only an example of a MARC map setup for a title keyword index. Depending on what type of keyword index you are creating, your MARC map setup may be different. (For complete information on creating MARC maps, see “MARC Maps” on page 2-93.)
To create a MARC map for the keyword index

| View:    | marc_map |
| Process: | Administration\Index Control Menu\MARC Map Table |

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marc_map Code</td>
<td>Enter the code that identifies the MARC map. (For example, if you are creating a Title Keyword index, you could name the MARC map “Stitle”.)</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the MARC map. (For example, for a Title Keyword index, you could enter “Title Keywords”.)</td>
</tr>
<tr>
<td>Search Limit?</td>
<td>Clear this box. This option is for Search Limiting MARC maps only.</td>
</tr>
<tr>
<td>Sort Filter</td>
<td>Leave the No Filter option marked.</td>
</tr>
<tr>
<td>Run-on</td>
<td>Leave the Do Not Run-on option marked.</td>
</tr>
</tbody>
</table>
In this field | Do this
---|---
Tag | Enter the tags you want the MARC map to extract information from.

For example, if you are creating a keyword indexing MARC map to extract title information, your first extraction tag would be “245”. This is an example of the extraction tags and subfields for a MARC map used for a standard Title Keyword index:

<table>
<thead>
<tr>
<th>245: adfghknps</th>
</tr>
</thead>
<tbody>
<tr>
<td>210: a</td>
</tr>
<tr>
<td>212: a</td>
</tr>
<tr>
<td>222: ab</td>
</tr>
<tr>
<td>242: ab</td>
</tr>
<tr>
<td>248: adfghknps</td>
</tr>
</tbody>
</table>

Part | Enter the subfields or fixed field positions of the tag you want the MARC map to extract information from.

Conditional Part | If you want to set a condition on the tag you are extracting, enter which part (subfield or fixed field position) must contain the conditional value in order for Horizon to extract the MARC information.

**NOTE**

Entering conditions requires that you specify characters, such as the slash (/) before a fixed field position, and so forth. (For a list of conditional characters, see “Conditional MARC Map Syntax” on page 2-97. For an example of how a conditional character can be used, see “Example of a MARC Map with Conditionals” on page 2-98.)
### Creating Indexes from Scratch

#### Creating a Index Definition for the Index

You create an index definition for the keyword index you are creating. This definition controls how Horizon sets up the name of the index, how the data is stored, what database table column stores the sorted data, and so forth. Once you create this index definition, you assign the index to a search option that displays in staff searching.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conditional Value</td>
<td>If you want to set a condition on the tag you are extracting, enter the value the conditional part (subfield or fixed field position) must contain in order for Horizon to extract the MARC information.</td>
</tr>
<tr>
<td>Distinct Subfields</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want Horizon to treat each subfield in the extraction tag you are setting up as a separate entry in the index or as a separate line in your display, mark this box.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>If you mark this option, you must make sure the Do Not Run-on option is also marked for this MARC map.</td>
</tr>
<tr>
<td></td>
<td>• If you want Horizon to treat all subfields as one entry, leave this box unmarked.</td>
</tr>
</tbody>
</table>

**NOTE**

In this title keyword index example, there are no conditions set on the entire map. This is because you want to extract all title tags without any conditions. As a result, this example includes no entries in the Conditional group on the last page of the marc_map view. Depending on what type of keyword index you are creating, you may or may not need to set conditions on your entire MARC map. (For complete information on conditional parts of a MARC map, see “Understanding Conditional Parts of a MARC Map” on page 2-96.)

There are many types of keyword indexes you can create on your Horizon system. This section contains only an example of an index definition setup for a title keyword index. Depending on what type of keyword index you are creating, your index definition setup may be different.
To create an index definition for the index

View: mq_index  
Process: Administration\Index Control Menu\Indexes

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Mq Index               | Enter a code for the index.  
This is the code you assign to a specific search option. (For example, if you are creating a Title Keyword index, you may enter “titlKW”.) |
| Description            | Enter a description for the index.  
(For example, if you are creating a Title Keyword index, you would enter “Title Keyword”.) |
| Index Table            | Enter the name of the index table you created on the database.  
This is the table that will store the data. This is the index table you created in a previous task. (For more information, see “Creating an Index Table” on page 4-29.) |
| Sort Col.              | Enter “word#” if you are creating a keyword index.  
This is the name of the column in the new index table that sorts the data. |
| Base Table             | Enter the source table for the raw data (the data you want to index).  
For a Title Keyword index, this is the bib table. |
<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Index Col.</td>
<td>Enter the column in either the auth or bib table where the index finds the raw data (the text of the MARC subfields and tags). For a Title Keyword index, this is the “text” column.</td>
</tr>
<tr>
<td>Key Col.</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If the MARC information you want to index is in the bib table, enter “bib#”. For a Title Keyword index, you would enter “bib#”.</td>
</tr>
<tr>
<td></td>
<td>• If the MARC information you want to index is in the auth table, enter “auth#”.</td>
</tr>
<tr>
<td>N_Keys Col.</td>
<td>Enter the name of the column (new entry) you added to the word table in a previous step. (For more information, see “Adding a Word Table Entry for the Index” on page 4-34.) (For example, enter “n_titlkws”.) This column records how many times the word exists in the index you are creating.</td>
</tr>
<tr>
<td>Word Table</td>
<td>Leave this field blank.</td>
</tr>
<tr>
<td>marc_map</td>
<td>Enter or choose the code for the MARC map this index will use to extract MARC tags and subfields. For a Title Keyword index, you can use the MARC map you created in a previous step. (For more information, see “Creating a MARC Map for the Keyword Index” on page 34.)</td>
</tr>
<tr>
<td>One Tag Only</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you are creating a multiple tag index, leave this box unmarked. For a Title Keyword index, you would clear the mark from this box.</td>
</tr>
<tr>
<td></td>
<td>• If you are creating a single tag index, mark this box. When you mark this, Horizon extracts and indexes only the result of the first tag as specified in this MARC record.</td>
</tr>
<tr>
<td>Ignore Spacer For Indexing</td>
<td>Leave this box unmarked.</td>
</tr>
<tr>
<td>Show Author</td>
<td>Leave this box unmarked.</td>
</tr>
<tr>
<td>Show Subject</td>
<td>Leave this box unmarked.</td>
</tr>
<tr>
<td>Show Series</td>
<td>Leave this box unmarked.</td>
</tr>
<tr>
<td>Index Type</td>
<td>Choose the <strong>Keyword</strong> option. The index type controls what algorithm Horizon uses as it indexes.</td>
</tr>
</tbody>
</table>
### Processor

Enter the type of processor Horizon uses for the index type.

For a Title Keyword index, you would enter the “keyword” processor.

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processor</td>
<td>Enter the type of processor Horizon uses for the index type. For a Title Keyword index, you would enter the “keyword” processor.</td>
</tr>
</tbody>
</table>

### Display Type

<table>
<thead>
<tr>
<th>Display Type</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Combined     | Choose one of these options:  
  - **Staff-only.** This contains only records with the Staff Only flag checked.  
  - **Public-only.** This contains only records with the Staff Only flag cleared.  
  - **Combined.** This contains both Staff-only and Public-only records.  
  
  **NOTE**  
  The Staff Only option is useful only if your library has Public Only indexes defined. This is because both Staff Only and Combined indexes contain Staff Only records. Only Public Only entries filter out the Staff Only records. |

| Queue        | Enter a “0” in this field. Horizon uses this value in Deferred Indexing. |
Creating an View Definition to Display Search Results

You create a view definition for the index in the Table Editor. The view definition lets you display search results in a window in Horizon. The view definition defines how, when, and where the indexed data displays in the Horizon window. A view definition defines the table where the data comes from, where in the Horizon processes the data displays (for example, the Table Editor or staff searching).

**NOTE**

There are many types of keyword indexes you can create on your Horizon system. This section contains only an example of a view definition setup for a keyword subject index. Depending on what type of keyword index you are creating, your view definition setup may be different.
Chapter 4: Indexing

To create a view definition to display search results

**View:** mq_view  
**Process:** Administration\System Setup\View Control

![Edit Horizon View](image)
<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| **Mq view**            | Enter a name for the new view.  
You should give the view a name that represents the data the Horizon window will display. (For example, if you are creating a window to display subjects in a keyword results list, enter “closauth_subject”.) |
| **Description**        | Enter a description of the view.  
(For example, if you are displaying subjects in a keyword results list, enter “PAC--Closed subject list”.) |
| **View Type**          | Choose one of these options to specify where in Horizon this window displays.  
- **Title Alphabetical**. Choose this type if the view you are creating displays data from the bib table.  
- **Authority List**. Choose this type if the view you are creating displays data from the auth table, such as subjects.  
For list of subjects by keyword, you would choose **Authority List**. |
| **Table Name**         | Enter the name of the database table where data that you want to display is stored.  
**NOTE**  
You can use an existing database table for this table. Typically, you would use one that you already use for a similar browse search. (For example, for a title keyword, you would use the existing “title” table; for a subjects results list, you would use the existing “subject” table.) |
| **Window Title**       | Enter the name you want to display in the title bar for the window.  
You should give the window a title that represents the type of information displayed.  
(For example, enter “Subjects”.) |
| **Help panel id**      | Leave this field blank. |
| **Properties**         | Mark the **Xrefs** box for an authority search.  
This box specifies that See and See Also references are displayed in staff searching. |
| **Secured**            | Leave this box unmarked. |
In this field or group | Do this
---|---
Column Name | Enter “processed.”
This is the name of the column from the index table where the indexed data is stored.

Ord | Enter the order you want data in this column to display in the window in Horizon.

Column Label | Enter the name you want to display for this column header in the list window.

No. of Display Characters | Enter the number of characters of the column data you want to display by default.

Pad Character | Leave this box unmarked.

Properties | Mark the **Displayed** box to display data from this column in the window.

Sort Processor | Enter “SrAlpha” as the sort processor.

Click New to create new column entries for any additional columns from the index table that you want to display in the list window. (For example, if you are creating a view to display subjects in a keyword results list, you could create additional entries for these columns: n_bibs, see_flag, and see_also_flag.)

You create a column entry for each column in the index table that you want to display in the window.
Adding the New Index Definition to Your Search Options

Now that you have created an index, index definition, and a view definition for the window that displays the data, you can add the new index definition as a new search option in staff searching. When you create a search option for the index, you provide accessibility to the indexed data. In addition, you also assign a view to the search option to display the indexed data. Once you create a search option for the index, the search option will display in the main search window in staff searching.

To create a search option for the index

View: search
Process: Searching\PAC Control Menu\Search Option Table

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Enter the code for staff searching for this search option. The code for staff search options <strong>must</strong> be the same as the PAC flavor where this search displays.</td>
</tr>
<tr>
<td>Index No.</td>
<td>Enter a number to specify the order this search option displays in the main search window in staff searching.</td>
</tr>
<tr>
<td>Label</td>
<td>Enter a descriptive name for the search option. This is the label that displays for the search option in the main search window. You should use a name that your library staff understands. (For example, if you are setting up a title keyword search option, you might enter “Title Keyword”.)</td>
</tr>
<tr>
<td>Mq Index</td>
<td>Enter the Horizon index you created for the index. (For more information, see “Creating the Index Definition in the Table Editor” on page 4-15.)</td>
</tr>
</tbody>
</table>
### Chapter 4: Indexing

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Table, or Column, or Foreign Key]</td>
<td>Leave these fields blank.</td>
</tr>
<tr>
<td>This index contains</td>
<td>Enter the help text that you want to display for the search option in the main search window.</td>
</tr>
<tr>
<td></td>
<td>(For example, for a title keyword search option, you might enter “Keywords from title fields and contents notes”.)</td>
</tr>
<tr>
<td>Example 1</td>
<td>Enter an example of a search string a user might enter for this search option.</td>
</tr>
<tr>
<td></td>
<td>(For example, for a title keyword search option, you might enter “strategic planning” as the example.)</td>
</tr>
<tr>
<td></td>
<td>Users can view this example by clicking the Example button in the main search window.</td>
</tr>
<tr>
<td>Describe example 1</td>
<td>Enter a description of the search results for example 1.</td>
</tr>
<tr>
<td></td>
<td>(For example, the text for a title keyword search option might be “To find titles containing the words ‘strategic’ and ‘planning’”.)</td>
</tr>
<tr>
<td>Example 2</td>
<td>Enter another example of a search string a user might enter for this search option.</td>
</tr>
<tr>
<td></td>
<td>(For example, the example for a title keyword search option might be “comput*”.)</td>
</tr>
<tr>
<td></td>
<td>Users can view this example by clicking the Example button in the main search window.</td>
</tr>
<tr>
<td>Describe example 2</td>
<td>Enter a description of the search results for example 2.</td>
</tr>
<tr>
<td></td>
<td>(For example, the description might be “To find titles containing the words started with ‘comput’”.)</td>
</tr>
<tr>
<td>Display View</td>
<td>Enter the view that displays the search results.</td>
</tr>
<tr>
<td></td>
<td>This is the view that displays the data.</td>
</tr>
<tr>
<td></td>
<td>(For example, for a title keyword search option, you would enter “biblist”.)</td>
</tr>
<tr>
<td><strong>IMPORTANT</strong></td>
<td>You must enter a view in this field, or the index will not work.</td>
</tr>
<tr>
<td>Z39.50 Use Attr.</td>
<td>If you are setting up your database so Z39.50 server-compliant clients can search it, enter the Z39.50 use attribute.</td>
</tr>
<tr>
<td></td>
<td>This assigns the search attribute to the search option.</td>
</tr>
<tr>
<td></td>
<td>(For example, choose or enter the code for a Title Keyword index.)</td>
</tr>
</tbody>
</table>
Populating Your New Index Using ReIndex

You use the ReIndex utility to populate your new index table with data. You download this utility from the Products/Horizon/Downloads/Upgrades page on the SirsiDynix customer web site at clientcare.sirsidynix.com. You run ReIndex from a Command Prompt. Before you run it, you add command-line arguments or “switches” to the ReIndex executable to set the type of index and the Horizon index code your database builds.

To populate your new index using ReIndex

1. Close any running Horizon applications.
2. At a command prompt, go to the directory on the workstation where you downloaded the ReIndex executable.
3. Run this command to display a list of valid switches you can add to ReIndex:
   ReIndex.exe /?

   **NOTE**

   You must enter a space before the slash (/) character.

   The Command Prompt displays these parameters:

   ![Command Prompt output]

4. Enter one of these options at the command prompt, followed by any optional switches you want to use:
   - If the index you want to build is bib-based, enter this command:
     ReIndex.exe /server /password /user /database /m1 /indexcode
   - If the index you want to build is authority-based, enter this command:
Chapter 4: Indexing

ReIndex.exe /server /password /user /database /m2 /i/indexcode

**NOTE**

The index code you enter in the “i” switch is the code you gave the index definition in the Table Editor in a previous step. (For more information, see “Creating the Index Definition in the Table Editor” on page 4-15.)

**NOTE**

Depending on how many records you are building in your index, the ReIndex process may take a long time.
Setting Up a Keyword Index for Horizon Information Portal

Horizon Information Portal version 3.x and earlier uses the standard Horizon indexes for browse and exact match searches, but requires new indexes for keyword searches. You build these indexes with a utility called Horizon Index Services. This utility provides many advantages over the standard keyword indexing in Horizon, including faster indexing and search response time; additional Boolean search capabilities; and, in many cases, more comprehensive indexing.

With Horizon Index Services, you actually create only one physical index. However, the end result will be multiple search types that act like multiple indexes. Unlike the Horizon indexes, which require a separate index for each search type, Horizon Index Services lets you define one index for all the keyword search types you want to use in Information Portal (such as title keyword, author keyword, subject keyword, series keyword, or general keyword).

This section explains these topics:

- Creating the Index Definition
- Adding Limit Options
- Setting Up Horizon Index Services
- Building the Index
- Starting the Search Server
- Making the Index Available in Information Portal
- Managing Keyword Indexes
- Technical Details

**IMPORTANT**

With Information Portal 4.0, you need only do these tasks to set up keyword indexes:
- Creating the Index Definition
- Adding Limit Options

The rest of the tasks relating to Horizon Index Services are no longer valid. In addition, Information Portal imports indexes “on-the-fly”, so you never need to import Horizon indexes into Information Portal.

**Before You Begin**

The keyword search index for Information Portal uses MARC maps for indexing. If you want your Information Portal keyword searches to display the same information as your Horizon searches, the index definition you create in this task must use the same MARC maps that are used in the PAC flavor searched in Horizon.

This section explains how to find out which index is assigned to a Horizon search option, and how to find out which MARC map is linked to that index. Then, when you set up your index definition, you can make sure the definition uses these MARC maps.

This section helps you:

- Find out the indexes assigned to each Horizon keyword search that you want to display in Information Portal.
- Find out which MARC map is assigned to each keyword index.
To find out which indexes are assigned to each keyword search that you want to display in Information Portal

1. Open the search view in the Table Editor, or start the Search Option Table process. The default location of this process is the Searching\PAC Control Menu folder on the navigation bar.

2. If a Search window displays, do one of these options:
   - In the Search for field, enter the name of the search option that you want to display in Information Portal. (In most cases, this should be the name of a PAC flavor.)
   - Enter an asterisk (*) to display all search options.

3. Double-click the keyword search option that you want. Horizon displays the Edit Lister Search Lists window.

4. In the Indexes group, click the drop-down list to show all the indexes being used for this keyword search.

Here is a sample window for a General Keyword search:

5. Write down the names of these indexes, then close the window without making any changes.

6. Repeat steps 3 through 5 in this table for each keyword search option that you want to display in Information Portal.

NOTE

If you have only a single index assigned to this search option, the Mq Index field shows the name of that index.

5. Write down the names of these indexes, then close the window without making any changes.
6. Repeat steps 3 through 5 in this table for each keyword search option that you want to display in Information Portal.
Setting Up a Keyword Index for Horizon Information Portal

Creating the Index Definition

Before you build the keyword index for Information Portal, you must create an index definition. This definition specifies what data will be included in the keyword index. It also defines the sort and limit options that are available for searches that use the keyword index. Information Portal uses only one keyword index, so you need to create only one index definition.

You can edit the index definition at any time, but the only fields you can change without having to rebuild the index are Search Serv IP Addr and Search Serv Port. No other changes will be reflected in searches until you rebuild the index.

To create the index definition

1. Open the \texttt{word\_index} view in the Table Editor.
   Horizon displays the List Horizon Word Index Definitions window.
2. Choose the index definition you want to change, or create a new definition.
Horizon displays the Edit Horizon Word Index Definitions window:

3 Complete these fields in the window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Index Name             | 1 Enter a short name for the index definition (such as “idx”). The Horizon Indexer uses this name in the filenames of the index it creates.  
                        | 2 Write this name down so that you can retrieve it easily. You will have to enter it in the INDEX NAME setting in the issettings.conf file, described on page 4-65. |
Setting Up a Keyword Index for Horizon Information Portal

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Search Serv Port           | 1. Enter “12502” or some other available port. This is the port that Horizon Index Services will use to receive search requests from Information Portal. Port 12502 is recommended because it is probably not in use. However, if the machine where you will run Horizon Index Services already uses this port for another process, enter a different, unused port. You can use the “netstat” command in Windows or UNIX to display a list of ports currently in use. (For more information about netstat, see your Windows or UNIX documentation.)

2. Write this number down so that you can retrieve it easily.

You will have to enter it in the HZN SEARCH SERVER PORT setting in the issettings.conf file, described on page 4-65. |
| Table Name                 | Enter “bib”. The bib table is the only table that you can use for an Information Portal keyword index. |
| Key Column                 | Enter “bib#”. This is the key column for the bib table you specified in the Table Name field. |
| ISBN de-duping MARC map    | Enter the MARC map code, or click Codes to choose from a list of valid codes. This value is only used with Horizon Information Portal (HIP) 4.0. Horizon 7.5 does not support HIP 4.0. |
| ISSN de-duping MARC map    | Enter the MARC map code, or click Codes to choose from a list of valid codes. This value is only used with Horizon Information Portal (HIP) 4.0. Horizon 7.5 does not support HIP 4.0. |
| OCLC de-duping MARC map    | Enter the MARC map code, or click Codes to choose from a list of valid codes. This value is only used with Horizon Information Portal (HIP) 4.0. Horizon 7.5 does not support HIP 4.0. |
| LCCN de-duping MARC map    | Enter the MARC map code, or click Codes to choose from a list of valid codes. This value is only used with Horizon Information Portal (HIP) 4.0. Horizon 7.5 does not support HIP 4.0. |

4. Complete the fields in the Sort Fields group for each sort option you want to include in the index:
This group lets you define the sort options that are available for searches that use the index. (For example, to let users sort search results by title, author, and publication date, complete a group entry for title, another for author, and a third for publication date.) Click New for each sort option you want to add.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARC Map</td>
<td>Enter the MARC map code for the data you want to let users sort by, or click Codes to choose from a list of valid codes. Use a display MARC map that is based on bib records, not authority records. The MARC map identifies the specific tags and subfields that will be used for the sort option. You will probably want to use display MARC maps for sort options.</td>
</tr>
<tr>
<td>Processor</td>
<td>If the MARC map you entered is for publication date, enter “pubdate”. Enter “ipackwd” for everything else. Do not use the “keyword” processor. The “keyword” processor is for keyword indexes in Horizon, not Information Portal.</td>
</tr>
</tbody>
</table>

**IMPORTANT**

Information Portal will display a sort label based on the description field associated with the MARC map you choose. (For example, if you choose “Dtitle” as a MARC map, and this MARC map has the description of “title”, then Information Portal will display “title” in its Sort drop-down menu.) For that reason, if the MARC map you choose does not have a description you want, you must use Horizon’s Table Editor to edit the description field of the MARC map to reflect what you would like your patrons to see in Information Portal. (For instructions on opening a view, see “Opening a View in the Table Editor” on page 1-15.)

5 Complete the fields in the **Search Fields** group to specify the data you want to include in the index:

[Image of Search Fields table]

This group lets you define the bibliographic data to include in the index. It also defines the search types that are available in Information Portal. When a user performs a search, Horizon Index Services compares the search terms with the data in the MARC maps you enter here. Click New for each MARC map you want to add.
### Setting Up a Keyword Index for Horizon Information Portal

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix</td>
<td>1. Enter a three-character code that identifies the data type of the MARC map you are adding. SisriDynix recommends using a dot followed by two letters. (For example, enter &quot;.tw&quot; for title MARC maps, &quot;.aw&quot; for author MARC maps, and &quot;.gw&quot; for MARC maps you want for a general keyword search.) Even though Horizon lets you enter more than three characters, you must enter only three for the index to work. Each prefix you define represents a search type that you can make available in Information Portal. When you install Information Portal or import indexes into Information Portal, Information Portal displays the prefixes defined here. You can then associate each prefix with a search type in Information Portal. (In the example above, you would assign &quot;.tw&quot; to a title keyword search, &quot;.aw&quot; to an author keyword search, and &quot;.gw&quot; to a general keyword search.) 2. Write down the prefix you choose so that you can retrieve it easily. You will have to enter it again when you install Information Portal. Also write down the label for the search type you want to associate with it. (For example, write down &quot;.tw&quot; and &quot;title keyword&quot; because only the &quot;.tw&quot; will display during the Information Portal installation process.) You can add multiple entries that use the same prefix. This lets you include more than one MARC map for a single search type. (For example, you can define a general keyword search that includes data from multiple MARC maps. To do this, you might create an entry with a prefix of &quot;.gw&quot; [general keyword] and a MARC map for title data, a second entry with a prefix of &quot;.gw&quot; and a MARC map for author data, and a third entry with a prefix of &quot;.gw&quot; and a MARC map for subject data.)</td>
</tr>
<tr>
<td>MARC Map</td>
<td>Enter the MARC map code for the data you want to include in the index for the search type you specified the Prefix field, or click Codes to choose from a list of valid codes. Use an indexing MARC map that is based on bib records, not authority records. Indexing MARC maps usually begin with the letter I, S, or Z. The MARC map identifies the specific tags and subfields that will be included in the index. IMPORTANT: If you want your Information Portal keyword searches to display the same information as your Horizon searches, the MARC maps you assign here must be the same as the MARC maps used in the PAC flavor search in Horizon. (For instructions on making sure your keyword indexes in Information Portal match those in Horizon, see “Before You Begin” on page 4-49.)</td>
</tr>
<tr>
<td>Processor</td>
<td>Enter “ipackwd”. Do not use the “keyword” processor. The “keyword” processor is for keyword indexes in Horizon, not Information Portal.</td>
</tr>
</tbody>
</table>
Chapter 4: Indexing

Adding Limit Options

You can add limit options to the index definition. This lets users restrict search results to records that match certain criteria, such as certain collections, locations, or languages. You define limits using data on bib, item, or copy records.

The limits you define in the index definition are available for use in predefined and user-defined limits in Information Portal. (For more information about predefined and user-defined limits, see the Information Portal System Administrator’s Guide.)

This section explains these topics:

- Creating Group Limit Definitions
- Adding Limit Options to the Index Definition
- Setting Up a Horizon Index Limit for Horizon Information Portal
- Controlling Keyword Reindexing in HIP 4.x

Creating Group Limit Definitions

Before you add limit options to the index definition, you need to create one or more group limits. A group limit defines the specific data by which search results will be limited. A group limit can include one or more pieces of data, such as one or more collection codes (from item or copy records), or one or more language codes (from bib records). (For example, you might create a group limit called “Kids Books” that includes all the collection codes for juvenile books.) Even though the name implies more than one, you can create group limits that include only one piece of data (such as a single collection code), as needed.

While Horizon Index Services supports group limits that combine data of the same type, it does not support group limits that combine data of different types. (For example, you cannot use a group limit that combines a collection code and a location code.) However, you can combine limits of different types later in Information Portal. (For more information, see the Information Portal System Administrator’s Guide.) Horizon will not prevent you from creating a group limit that combines data of different types, but such limits will not work.

Combining limit data at the index level results in faster searching than if you wait and combine limits later in Information Portal. This means that you should define group limits for all the combinations of the same data type that you want. Then use Information Portal to combine limits of different data types.

To create group limit definitions

1. Open the group_limit view in the Table Editor.
   Horizon displays the List Word Index Group Limit Definitions window.
2. Choose the group limit definition you want to change, or create a new group limit definition.

Save your changes.
Horizon displays the Edit Word Index Group Limit Definitions window:

3 Complete these fields in the window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Limit ID</td>
<td>Enter a code that identifies the group limit. For example, if you are creating a group limit that combines a “Juvenile Nonfiction”</td>
</tr>
<tr>
<td></td>
<td>collection and a “Juvenile Fiction” collection into one limit option, you might enter “kids”. Enter a code that is short and that</td>
</tr>
<tr>
<td></td>
<td>includes letters and numbers only (no spaces or punctuation marks).</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the group limit.</td>
</tr>
<tr>
<td>Group Limit Member</td>
<td>Enter the data you want to include in the group limit. For example, to include a location from your item or copy records, enter the</td>
</tr>
<tr>
<td></td>
<td>location code. Or, to include the French language element from your MARC records, enter “fre”.</td>
</tr>
</tbody>
</table>

**IMPORTANT**

Be sure to enter the data exactly as it exists the database. Refer to your Horizon tables or MARC manual to verify if necessary.

Click **New** for each additional piece of data you want to add. Include only data of the same type (that is, from the same table column or MARC field) in the same group limit.

4 Save your changes.
Adding Limit Options to the Index Definition

After you have created group limits, you can add limit options to the index definition.

To add limit options to the index definition

1. Open the word_index view in the Table Editor.
   Horizon displays the List Horizon Word Index Definitions window.
2. Choose the index definition you created earlier.
   Horizon displays the Edit Horizon Word Index Definitions window.
3. Click Page Down or resize the window as necessary to display the Filter Information group:
   
   ![Image of Filter Information group]

   4. Complete these fields for each limit option you want to include in the index (click New for each option you want to add):

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Enter a description of the limit you are defining. For example, enter “Kids Books” for a limit that restricts search results to your juvenile collections. IMPORTANT Unless you change it in Information Portal, the description you enter here will be the name of the limit that users see in Information Portal.</td>
</tr>
<tr>
<td>Prefix</td>
<td>Enter a three-character prefix that identifies the limit type. SirsiDynix recommends using a dollar sign followed by two letters (for example, “$lo” for a location limit, “$co” for a collection limit, and “$la” for a language limit). Even though Horizon lets you enter more than three characters, you must enter only three for the limit to work.</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>-----------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>MARC Map</td>
<td>Do one of these options:&lt;br&gt;• If you are adding a limit that uses data on bib records, enter the limit MARC map code for the data you want to limit by, or click <strong>Codes</strong> to choose from a list of valid codes. (For example, if you are adding a limit that lets users restrict search results by language, enter the limit MARC map that includes the language element in the 008 tag.)&lt;br&gt;Enter the appropriate map based on the group limit you plan to assign in the Group Limit ID field (explained page 4-59). Use a limit MARC map that is based on bib records, not authority records. Limit MARC maps begin with the letter L.&lt;br&gt;• If you are adding a limit that uses data on item or copy records, leave this field blank.</td>
</tr>
<tr>
<td>Table Name</td>
<td>Do one of these options:&lt;br&gt;• If you are adding a limit that uses data on item records, enter “item”.&lt;br&gt;• If you are adding a limit that uses data on copy records, enter “copy”.&lt;br&gt;• If you are adding a limit that uses data on bib records, leave this field blank.</td>
</tr>
<tr>
<td>Table Column</td>
<td>Do one of these options:&lt;br&gt;• If you are adding a limit that uses data on item or copy records, enter the name of the column in the item or copy table that contains the data you want to limit by.&lt;br&gt;  (For example, enter “collection” to limit by collection; enter “location” to limit by location.)&lt;br&gt;• If you are adding a limit for data on bib records, leave this field blank.</td>
</tr>
<tr>
<td>Group Limit ID</td>
<td>Enter the group limit code you want for the limit option, or click <strong>Codes</strong> to choose from a list of valid codes.&lt;br&gt;The group limit (which you created in the previous task) defines the specific data by which a search will be limited if the user selects the limit option.</td>
</tr>
<tr>
<td>Processor</td>
<td>Enter “none”.</td>
</tr>
</tbody>
</table>
Chapter 4: Indexing

Setting Up a Horizon Index Limit for Horizon Information Portal

Horizon Information Portal lets you limit a search by any of your Horizon indexes. The primary use of this feature is to supply a limit for a range of publication dates on the Advanced or Power searching pages. (For example, users can search for all titles that match their search criteria and have been published between 1990 and 2000.)

You can set up your Horizon indexes as limits in Information Portal. To use the date range limiting feature, you must set up the Dpdate search field with the “.yr” prefix in Horizon. Then, you can make the index a limit in Information Portal setup. (For instructions on setting up prefixes for search fields, see “Creating the Index Definition” in the “Setting Up a Keyword Index for Horizon Information Portal” in the “Indexing” chapter of the Horizon System Administration Guide.)

To set up a Horizon index limit

1. Open the word_index view in the Table Editor.
   Horizon displays the List Horizon Word Index Definitions window.
2. Open the word index definition that you want.
3. In the Search Fields group, do these steps to be sure that you have a Dpdate search field with a “.yr” prefix:
   - Look in the Search Fields list for the “.yr” prefix.
   - Choose the “.yr” prefix, or create a new one.
   - Be sure the fields for the “.yr” prefix have these values:
     - Prefix. Enter “.yr”.
     - MARC Map. Enter “Dpdate”.
     - Processor. Enter “PubDate”.
4. Save your changes.
5. Build or rebuild your Information Portal keyword index.
   (For instructions, see “Setting Up a Keyword Index for Horizon Information Portal” in the “Indexing” chapter of the System Administration Guide.)
6. Set up a Horizon index limit.
   (For instructions, see “Setting Up a Horizon Index Limit” in the “Changing the Setup” chapter of the Horizon Information Portal System Administrator’s Guide.)
Controlling Keyword Reindexing in HIP 4.x

In versions prior to Horizon 7.4 and HIP 4.x, Horizon controlled keyword reindexing in Information Portal using database triggers based on changes to specific database columns (such as location or collection).

Release Horizon 7.4/HIP 4.0 and higher does not use triggers to force Information Portal to do keyword reindexing of bibs. Horizon reindexes based on the filtering entries that you specify in the word_index view. Information Portal uses the entries in the Filter Information group in the word_index view as the mechanism to “know” whether a change to any table should force Horizon to reindex a bib. (For example, if you want Information Portal to reindex a bib each time you make any change to an item’s location, you must specify the item table and location column in the Filter Information group in the word_index view.)

You use the Filter Information group in the word_index view to control both keyword reindexing and limiting setup in Information Portal. Any change to a table defined in the Filter Information group will force reindexing as well as be a limiting option in Information Portal searching. (For more information about setting up limiting, see “Adding Limit Options” on page 4-56.)

**IMPORTANT**

Each entry in the Filter Information group is used to control reindexing and as a limiting option. Although Horizon does not require you to enter information in all fields in the group to control reindexing, because each entry is also used as a limiting option, you must complete all fields in the group.

**NOTE**

By default, any updates to bibs automatically force Information Portal to do keyword reindexing. You do not need to do any setup for this to occur.

To control keyword reindexing in Information Portal

1. Open the word_index view in the Table Editor.
2. Display the Filter Information group.
3. Complete these fields in the group:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Enter a description of the limit you are defining.</td>
</tr>
<tr>
<td>Prefix</td>
<td>Enter a three-character prefix that identifies the limit type. SirsiDynix recommends using a dollar sign followed by two letters (for example, “$lo” for a location limit, “$co” for a collection limit, and “$la” for a language limit). Even though Horizon lets you enter more than three characters, you must enter only three for the limit to work.</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>--------------</td>
<td>---------</td>
</tr>
</tbody>
</table>
| MARC Map     | Do one of these options:  
  - If you are adding a limit that uses data on bib records, enter the limit MARC map code for the data you want to limit by, or click **Codes** to choose from a list of valid codes. (For example, if you are adding a limit that lets users restrict search results by language, enter the limit MARC map that includes the language element in the 008 tag.) Enter the appropriate map based on the group limit you plan to assign in the Group Limit ID field (explained page 4-59). Use a limit MARC map that is based on bib records, not authority records. Limit MARC maps begin with the letter “L”.  
  - If you are adding a limit that uses data on item or copy records, leave this field blank. |
| Table Name   | Do one of these options:  
  - If you want reindexing based on changes to the item table, enter “item”.  
  - If you want reindexing based on changes to the copy table, enter “copy”. |
| Table Column | If you want reindexing based on changes to columns in the item or copy tables, enter the name of the column from the specific table. |
| Group Limit ID | Enter the group limit code you want for the limit option, or click **Codes** to choose from a list of valid codes.  
The group limit defines the specific data by which a search will be limited if the user selects the limit option. |
| Processor    | Enter “none”. |

4 Save your changes.
Setting Up a Keyword Index for Horizon Information Portal

Setting Up Horizon Index Services

After you define the index, you need to set up Horizon Index Services. This section explains these topics:

- About Horizon Index Services
- Updating Horizon Index Services Settings

About Horizon Index Services

Horizon Index Services is an indexing and searching utility that you use to build the keyword index for Information Portal. It also processes the searches that use the index. You can run Horizon Index Services on any machine that meets certain requirements. Unlike standard Horizon indexes, the index you create with Horizon Index Services is stored to files on the hard drive of the machine where you install Horizon Index Services, not in the Horizon database. (For system requirements and installation instructions for Horizon Index Services, see the Horizon Application Suite Installation and Upgrade Directory.)

Horizon Index Services consists of three components: the Horizon Indexer, the Horizon Index Server, and the Horizon Search Server. The Indexer and Index Server build the index. The Search Server processes search requests.

To build the index, the Indexer extracts data from your Horizon database (based on the index definition you created in the word_index table). The Indexer then processes the data and sends it to the Index Server. The Index Server creates the index and saves the indexing data to the index. This diagram shows how Horizon Index Services builds an index using the Indexer and the Index Server:
When a user submits a keyword search in Information Portal, Information Portal sends the search request to the Search Server. The Search Server processes the request, queries the index, and sends a list of bib keys that match the search criteria back to Information Portal. Information Portal then retrieves the bib records from the Horizon database. This diagram shows how keyword searches in Information Portal are processed:

**Updating Horizon Index Services Settings**

Horizon Index Services comes with a configuration file containing several settings that affect its operation. Default settings are provided, but you should review them to make sure they are right for your library. At a minimum, you need to change the settings shown in bold text in the table that begins on this page.

To update Horizon Index Services settings

1. On the machine where you installed Horizon Index Services, open the *issettings.conf* file in a text editor (such as Notepad in Windows, or vi editor in UNIX or Linux).
   For Windows, the file location is:
   `Horizon Index Services installation directory\hznindexservices\conf\`
   For UNIX or Linux, the file location is:
   `Horizon Index Services installation directory/hznindexservices/conf/`

2. Use this table to change the settings in the file as needed.

   **IMPORTANT**
   Leave only one space between the setting name and the setting. Settings are case sensitive.
## Setting Up a Keyword Index for Horizon Information Portal

<table>
<thead>
<tr>
<th>For this setting</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>HORIZON DB IP</td>
<td>Enter the IP address (number or name) of your Horizon database server.</td>
</tr>
<tr>
<td>HORIZON DB PORT</td>
<td>Enter the port on which your Horizon database server receives requests.</td>
</tr>
<tr>
<td>HORIZON DB NAME</td>
<td>Enter the name of your Horizon database.</td>
</tr>
<tr>
<td>HORIZON DB USER</td>
<td>Enter a database user that belongs to the “staffgroup” security group. Horizon Index Services logs into the Horizon database under this user name. For security reasons, SirsiDynix recommends that you do not use your system administrator user. Also, note that the “pacgroup” security group does not have sufficient rights to build the index.</td>
</tr>
<tr>
<td>HORIZON DB PASSWORD</td>
<td>Enter the password for the database user you specified in the HORIZON DB USER setting.</td>
</tr>
<tr>
<td>INDEX NAME</td>
<td>Enter the name of the index definition you created earlier. This must match the name you entered in the Index Name field in the word_index view in Horizon. (The suggested name was “idx.”)</td>
</tr>
</tbody>
</table>
| INDEX PATH        | Enter the location where you want Horizon Index Services to store your index files. For Windows, the default location is:  
  *Horizon Index Services installation directory\indexes\*.  
  For UNIX or Linux, the default location is:  
  *Horizon Index Services installation directory/indexes/.*  
  SirsiDynix strongly recommends that you use the default path. However, if the path does not already exist, you need to create it before you build the index. |
| TEMP PATH         | Enter the location where you want the Indexer to put temporary files it generates while creating the index. For Windows, the default location is:  
  *Horizon Index Services installation directory\temp\*.  
  For UNIX or Linux, the default location is:  
  *Horizon Index Services installation directory/temp/.*  
  SirsiDynix strongly recommends that you use the default path. However, if the path does not already exist, you need to create it before you build the index.
### DYNAMIC INDEX SLEEP TIME

Enter the number of seconds you want the Indexer to wait between indexing cycles. (For example, enter “120” to wait two minutes between cycles.)

After your keyword index is built, the Horizon Indexer runs periodically to update the index as your library adds, updates, and deletes bib, item, and copy records. This setting lets you specify how often the Indexer checks for and processes changes. Enter an amount of time based on how quickly you want changes to be reflected in searching. The system resources required by the Indexer to check for updates is quite low, so entering a low number should not significantly impact system performance. The default setting is 120.

Once the Indexer starts, it runs until it has processed all changes before it “sleeps” again. This means that if you import a large number of new records, the Indexer works without pause until all the records are indexed.

### HZN INDEX SERVER IP

Leave this setting at “127.0.0.1” (localhost).

### HZN INDEX SERVER PORT

Use the default (12501) or some other available port.

This is the port on which the Index Server receives information from the Horizon Indexer. Port 12501 is recommended because it is probably not in use. However, if the machine where you installed Horizon Index Services already uses this port for another process, enter a different, unused port. You can use the “netstat” command in Windows, UNIX, or Linux to display a list of ports currently in use. (For more information about netstat, see your Windows, UNIX, or Linux documentation.)

### HZN SEARCH SERVER IP

Leave this setting at “127.0.0.1” (localhost).

### HZN SEARCH SERVER PORT

Enter the port that the Search Server uses to receive search requests from Information Portal.

This must match the port you entered earlier in the Search Serv Port field in the word_index view. (12502 was the recommended port.)

### HZN INDEXER IP

Leave this setting at “127.0.0.1” (localhost).

### HZN INDEXER PORT

Use the default (12503) or some other available port.

The Horizon Indexer runs on this port.

### HZN INDEX SERVER DEBUG

Leave this setting at “false.”

You can enter “true” to log detailed information about Index Server processes to a file. However, do so only when you need to track down indexing problems. Logging these processes slows down indexing and takes up disk space. (For more information, see “Debugging” on page 4-74.)
Setting Up a Keyword Index for Horizon Information Portal

3 Save your changes and close the file.

<table>
<thead>
<tr>
<th>For this setting</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>HZN SEARCH SERVER DEBUG</td>
<td>Leave this setting at “false.” You can enter “true” to log detailed information about Search Server processes to a file. However, do so only when you need to track down searching problems. Logging these processes slows down searching and takes up disk space. (For more information, see “Debugging” on page 4-74.)</td>
</tr>
<tr>
<td>HZN INDEXER DEBUG</td>
<td>Leave this setting at “false.”</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>You may need to add this final line to the file:</td>
</tr>
<tr>
<td></td>
<td>HZN_INDEXER_DEBUG false</td>
</tr>
<tr>
<td></td>
<td>UNIX and Linux installations need to check case sensitivity in the isssettings.conf file.</td>
</tr>
<tr>
<td></td>
<td>If you want to log detailed information about Indexer processes to a file, you can enter “true” instead of “false”. However, do so only when you need to track down indexing problems. Logging these processes slows down indexing and takes up disk space. (For more information, see “Debugging” on page 4-74.)</td>
</tr>
<tr>
<td>JDBC DRIVER</td>
<td>You specified this setting as you installed or upgraded Horizon Index Services. This setting has two values—one value for Sybase and one for MS SQL:</td>
</tr>
<tr>
<td></td>
<td>• If you are using an MS SQL database, this is the value of the setting:</td>
</tr>
<tr>
<td></td>
<td>com.microsoft.jdbc.sqlserver.SQLServerDriver</td>
</tr>
<tr>
<td></td>
<td>• If you are using a Sybase database, this is the value of the setting:</td>
</tr>
<tr>
<td></td>
<td>com.sybase.jdbc2.jdbc.SybDriver</td>
</tr>
<tr>
<td></td>
<td>Depending on the database you are using, Index Services comments out—using a pound sign (#)—the value of the other database and disregards that setting.</td>
</tr>
</tbody>
</table>

Building the Index

After you have defined the index and set up Horizon Index Services, you are ready to build the index. The Indexer will display how much time the process is taking, so you can predict how long the entire process will take. The time period will depend on the amount of data to index and the processing speed of the machine where you installed Horizon Index Services.

This section explains how to:

- Build the index on Windows.
- Build the index on UNIX or Linux.
Chapter 4: Indexing

To build the index on Windows

1. On the machine where you installed Horizon Index Services, open Windows Explorer.
2. Go to this directory:
   Horizon Index Services installation directory\win.
3. Double-click `startindexserver.bat` to start the Index Server.
   A command line window opens, showing the commands executed by the Index Server and the settings loaded from the configuration file.

   **IMPORTANT**
   Do not close this window. Closing the window stops the Index Server. The Index Server must be running for the Indexer to work.

4. In the win directory, double-click `startmassindexer.bat` to start the Indexer.
   The Indexer builds the index. A command line window opens, showing the progress of the Indexer. This sample text shows the kind of information you will see:
   - Initialize index files.
   - Index files initialized.
   - Indexed: 250 of 156130. Records per second: 35
   - Indexed: 500 of 156130. Records per second: 41
   - Indexed: 1000 of 156130. Records per second: 44

   **NOTE**
   If the Indexer is interrupted before the index is complete, you can resume the build. (For instructions, see “Resume a mass build of the index” on page 4-73.)

   After the index is built, the Indexer automatically switches to dynamic indexing mode to keep the index up-to-date as your library adds, updates, and deletes bib, item, and copy records. The command line window shows these messages when the Indexer is running in dynamic mode:
   - Waking up and checking for work to do.
   - Sleeping for 30 seconds.

   **IMPORTANT**
   Do not close this window. Closing the window stops the Indexer.

   To have future changes to your records included in the index, leave the Indexer and the Index Server running on an ongoing basis.
   If you need to stop the Indexer for some reason, see “Stop the Indexer” on page 4-72.

To build the index on UNIX or Linux

1. On the machine where you installed Horizon Index Services, open a console window.
2. At the “#” prompt, enter this command:
Setting Up a Keyword Index for Horizon Information Portal

1. At the “#” prompt, enter this command:
   cd Horizon Index Services installation directory/sun/

2. At the “#” prompt, enter this command:
   ./startindexserver
   Your system starts the indexer as a background process.

3. At the “#” prompt, enter this command:
   cd Horizon Index Services installation directory/sun/

4. At the “#” prompt, enter this command:
   ./startmassindexer
   The Indexer builds the index. The console window shows the progress of the Indexer. This sample text shows the kind of information you will see:

   Initialize index files.
   Index files initialized.
   Indexed: 250 of 156130.   Records per second: 35
   Indexed: 500 of 156130.   Records per second: 41
   Indexed: 1000 of 156130.  Records per second: 44

   After the index is built, the Indexer automatically switches to dynamic indexing mode to keep the index up-to-date as your library adds, updates, and deletes bib, item, and copy records. The console window shows these messages when the Indexer is running in dynamic mode:

   Waking up and checking for work to do.
   Sleeping for 30 seconds.

   To have future changes to your records included in the index, leave the Indexer and the Index Server running on an ongoing basis.

   If you need to stop the Indexer for some reason, see “Stop the Indexer” on page 4-72.

Starting the Search Server

After you start the Indexer, you need to start the Search Server so it can process Information Portal keyword searches. You can run the Search Server even if the index build is not complete to let users search a partial index. The index will be searchable after the Indexer completes the first 50,000 records.

IMPORTANT

After you start the Search Server, leave it running so that keyword search requests in Information Portal get processed.

To start the Search Server on Windows

1. On the machine where you installed Horizon Index Services, open Windows Explorer.
2. Go to this directory:
Horizon Index Services installation directory\win.

3 Double-click the `startsearchserver.bat` file.

To start the Search Server on UNIX or Linux

1 On the machine where you installed Horizon Index Services, open a console window.
2 At the “#” prompt, enter this command:
   `cd Horizon Index Services installation directory/sun/`
3 At the “#” prompt, enter this command:
   `./startsearchserver`

Making the Index Available in Information Portal

Now that you have built the index and started the Search Server, the last task is to make the index available in Information Portal. You do this during the installation of Information Portal (for instructions, see the Horizon Application Suite Installation and Upgrade Directory) or, if Information Portal is already installed, by importing the index into Information Portal (for instructions on importing an index, see the Information Portal System Administrator’s Guide).
Managing Keyword Indexes

Occasionally you may need to make changes to your index definition and rebuild the index, or perform other index-related tasks. This table lists all the maintenance tasks you can do in Horizon Index Services. It also explains how to start the Search Server.

<table>
<thead>
<tr>
<th>Task</th>
<th>When should I do this task?</th>
<th>How do I do this task?</th>
</tr>
</thead>
</table>
| Start the Indexer in mass mode | Whenever you need to build the entire index from scratch. For example, you start the Indexer in mass mode when you build the index for the first time, or to rebuild the index after making changes to the index definition. The existing index is deleted and a new index is created. This means that keyword searches in Information Portal will be unavailable or incomplete until the build is complete. If you want to let users search while the index is being built, you can start the Search Server after the Indexer has started processing the first batch of records. | **Windows**
1. Open Windows Explorer.
2. Go to Horizon Index Services installation directory\win.
3. Double-click `startindexserver.bat` to start the Index Server.
4. Double-click `startmassindexer.bat` to start the Indexer in mass mode.

**UNIX or Linux**
1. Open a console window.
2. At the “#” prompt, enter this command:
   ```
   cd Horizon Index Services installation directory/sun/
   ```
3. At the “#” prompt, enter this command:
   ```
   ./startindexserver
   ```
4. Open a second console window.
5. At the “#” prompt, enter this command:
   ```
   cd Horizon Index Services installation directory/sun/
   ```
6. At the “#” prompt, enter this command:
   ```
   ./startmassindexer
   ```
### Chapter 4: Indexing

#### Start the Indexer in dynamic mode

As needed after the index is built.

The Indexer switches to dynamic mode after building the index in mass mode, so you would need to start the Indexer in dynamic mode only if you had to stop the Indexer for some reason, or if the Indexer crashed.

In dynamic mode, the Indexer updates the index as your library adds, updates, and deletes bib, item, and copy records. The Indexer checks for changes periodically and updates the index accordingly. The wait time between indexing cycles is controlled by the DYNAMIC INDEX SLEEP TIME setting in the Horizon Index Services configuration file. (For instructions on updating the configuration file, see “Updating Horizon Index Services Settings” on page 4-64.)

**Windows**
1. Open Windows Explorer.
2. Go to Horizon Index Services installation directory\win.
3. Double-click `startindexserver.bat` to start the Index Server.
4. Double-click `startdynamicindexer.bat` to start the Indexer in mass mode.

**UNIX or Linux**
1. Open a console window.
2. At the “#” prompt, enter this command:
   `cd Horizon Index Services installation directory/sun/`
3. At the “#” prompt, enter this command:
   `./startindexserver`
4. Open a second console window.
5. At the “#” prompt, enter this command:
   `cd Horizon Index Services installation directory/sun/`
6. At the “#” prompt, enter this command:
   `./startdynamicindexer`

#### Stop the Indexer

Whenever you need to stop the Indexer.

For example, you must stop the Indexer before you can rebuild the index in mass mode. You might also stop and restart the Indexer if you are getting errors or if recently cataloged items are not showing up in search results.

**Windows**
1. Open Windows Explorer.
2. Go to Horizon Index Services installation directory\win.
3. Double-click `stopindexer.bat`.

The Indexer and Index Server command line windows close.

**UNIX or Linux**
1. Open a console window.
2. At the “#” prompt, enter this command:
   `cd Horizon Index Services installation directory/sun/`
3. At the “#” prompt, enter this command:
   `./stopindexer`

The Indexer and Index Server console windows close.
<table>
<thead>
<tr>
<th>Task</th>
<th>When should I do this task</th>
<th>How do I do this task</th>
</tr>
</thead>
</table>
| Resume a mass build of the index | If the Indexer is interrupted before it completes a mass build of the index. As the Indexer builds the index in mass mode, it saves its work periodically. If the Indexer is interrupted for any reason, you can resume the build from the previous save. Only the indexing performed since the previous save is lost. | **Windows**
1. Open Windows Explorer.
2. Go to Horizon Index Services installation directory\win.
3. Double-click `startindexserver.bat` to start the Index Server.
4. Double-click `resumemassindexer.bat` to start the Indexer in mass mode.

**UNIX or Linux**
1. Open a console window.
2. At the “#” prompt, enter this command:
   - `cd Horizon Index Services installation directory/sun/`
3. At the “#” prompt, enter this command:
   - `./startindexserver`
4. Open a second console window.
5. At the “#” prompt, enter this command:
   - `cd Horizon Index Services installation directory/sun/`
6. At the “#” prompt, enter this command:
   - `./resumemassindexer`

| Build part of the index | When you want to test the indexing without having to build the entire index. This option deletes the index (if it already exists) and indexes the first 10,000 records in your database. | **Windows**
1. Open Windows Explorer.
2. Go to Horizon Index Services installation directory\win.
3. Double-click `startindexserver.bat` to start the Index Server.
4. Double-click `startsampleindexer.bat` to build a portion of the index.

**UNIX or Linux**
1. Open a console window.
2. At the “#” prompt, enter this command:
   - `cd Horizon Index Services installation directory/sun/`
3. At the “#” prompt, enter this command:
   - `./startindexserver`
4. Open a second console window.
5. At the “#” prompt, enter this command:
   - `cd Horizon Index Services installation directory/sun/`
6. At the “#” prompt, enter this command:
   - `./startsampleindexer`
Chapter 4: Indexing

Technical Details

This section provides additional technical information about using Horizon Indexing Services.

Debugging

Horizon Index Services stores indexing and searching information to log files to help you track down problems if necessary. The location of these files is Horizon Index Services installation directory\log.

Some of these log files are created only if you set the corresponding debug setting in the configuration file to “true.” Logging the data stored in these files slows down indexing and searching and takes up significant disk space, so you should create them only when you need to track down problems.

Horizon Index Services always creates these log files:

- **indexer_status.log**: This file stores general information about the activity of the Indexer.

### Task When should I do this task? How do I do this task?

<table>
<thead>
<tr>
<th>Task</th>
<th>When should I do this task?</th>
<th>How do I do this task?</th>
</tr>
</thead>
</table>
| Start the Search Server     | After starting the Indexer (in either dynamic or mass mode). You can run the Search Server while the Indexer is running in mass build mode to let users search a partial index. The index will be searchable after the Indexer completes the first 50,000 records. You must leave the Search Server running so keyword searches in Information Portal are processed. | Windows  
1. Open Windows Explorer.  
2. Go to Horizon Index Services installation directory\win.  
3. Double-click startsearchserver.bat.  

UNIX or Linux  
1. Open a console window.  
2. At the “#” prompt, enter this command:  
   `cd Horizon Index Services installation directory/sun/`  
3. At the “#” prompt, enter this command:  
   `./stopindexer`

| Stop the Search Server      | Whenever you want to stop and restart the Search Server. You must stop the Search Server whenever you want to start the Indexer in mass build mode.                                                                                                       | Windows  
1. Open Windows Explorer.  
2. Go to Horizon Index Services installation directory\win.  
3. Double-click stopsearchserver.bat.  
   The Search Server command line window closes.  

UNIX or Linux  
1. Open a console window.  
2. At the “#” prompt, enter this command:  
   `cd Horizon Index Services installation directory/sun/`  
3. At the “#” prompt, enter this command:  
   `./stopsearchserver`  
   The Search Server console window closes. |
• **indexer_bad_records.log**. This file stores the bib numbers of records that the Indexer was unable to index. Generally, records logged to this file are corrupt.

Horizon Index Services creates these log files only if you set the corresponding debug setting in the configuration file to “true” (for instructions on changing these settings, see “Updating Horizon Index Services Settings” on page 4-64):

• **hznindexserver.log**. This file stores the data that the Index Server receives from the Indexer.

• **indexer_debug.log**. This file stores the data that the Indexer sent to the Index Server.

• **hznsearchserver.log**. This file stores processed search queries received from Information Portal.

### Other Horizon Index Services Settings

Horizon Index Services supports other settings that are not included in the `issettings.conf` configuration file by default. If you want to, you can add one or more of these settings to the configuration file to override the default value that Horizon Index Services uses.

The table below shows the additional settings you can add to the configuration file. To add any of these settings, type the setting name in uppercase, followed by a space and the value you want for the setting. (For instructions on editing the configuration file, see “Updating Horizon Index Services Settings” on page 4-64.)

<table>
<thead>
<tr>
<th>INDEX CHUNK SIZE</th>
<th>Enter the number of records you want the Indexer to process between index saves.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>50000 is the default that the Indexer uses unless you add this entry to the configuration file and enter a different number.</td>
</tr>
<tr>
<td></td>
<td>As the Indexer builds the index in mass mode, it saves its work periodically. This setting lets you specify how often the Indexer performs a save. If the Indexer is interrupted for any reason, only the indexing performed since the previous save is lost. If you resume the build, the Indexer will resume from the previous save, rather than rebuilding the entire index.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INDEX PARTITION SIZE</th>
<th>Enter the number of records to include in each index partition.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2 million (2000000) is the default that the Indexer uses unless you add this entry to the configuration file and enter a different number.</td>
</tr>
<tr>
<td></td>
<td>This setting lets you control the size of your index partitions (or files) so they do not exceed the maximum size of 2GB. When the number of records for a partition reaches the number you specify here, the Indexer creates a new partition and begins saving index information to the new partition. The recommended setting of 2 million will work for most libraries since the average file size for 2 million records is 1GB. However, you may need to enter a smaller number if your bib records are generally larger than average (for example, because of locally-defined tags).</td>
</tr>
</tbody>
</table>
### SEARCH SERVER THREADS

Enter the number of threads you want the Search Server to start with.

The Search Server will start with 6 threads unless you add this entry and enter a different number. In general, you will want about one thread per 30 concurrent Information Portal users.
Creating a Multiple-Source Collation Key Index

You can create multiple-source collation key indexes in Horizon. Multi-source indexes combine entries that are MARC-mapped from bib and authority records in a single browse list. This lets you search a single, sorted list containing both authors and titles.

Multi-source indexes work by defining two index definitions in Horizon. Both index definitions specify the same index table as their “output” destination, but one index uses the auth table as the “input” source, and the other index uses the bib table as the “input” source.

A multiple-source index is set up as a “union” or combination of a title-type index and an author-type index. It contains an auth# and cross-reference column like an authority index table, and a bib# and n_titles column like a title index table. It also contains a single instance of columns common to both types of index, such as the id#, backlink, and processed columns. Most likely, a uniform title index is a multi-source collation key index.

By creating two index definitions, Horizon considers these two indexes as one overlapping index and displays the search results in one window.

Important

You should create a collation key index from scratch only if you are completely comfortable creating and running SQL scripts to create data structures. If you are unsure about any of the steps in this section, Customer Support can create the index for you for an add-on service fee. To have a new index created for you, contact your Customer Sales Representative for a price quote.

Important

Do not delete the existing Horizon “title” index. Your collation key indexes cannot work without this Horizon index.

You create a multi-source collation key index by completing these tasks in this order:

1. Create database objects for the index.
2. Create two MARC maps to use with the index.
3. Create two index definitions in the Table Editor.
4. Create a view definition for the index.
5. Add the new index definition to your search options.
6. Populate the new index.

Creating Database Objects for the Index

You run an SQL script to create database objects necessary for your multi-source index. Before you run the script, you need to make changes to the script for your specific table name. You need to change the table name in the script to the name of the table you are creating for your database.

Note

You complete all the steps in this task using your SQL query tool. Make sure to watch for errors as you run your query.
To create database objects for the index

1. Open your SQL query tool.
2. Connect to your Horizon database.
3. From your Horizon installation CD, copy and paste the MultiSrcCollationKeyIndexTemplate.txt file in the **Utils** directory to your hard drive.
4. In your SQL query tool, open the SQL text file. This is the query that will create the necessary database objects for your new index.
5. Search for all instances of the dollar sign (\$) character and replace them with the name of your new table.
   (For example, if you are creating a collation key uniform title index, you may want to name your table “ck_uniform_title”.)

   **NOTE**
   In this step, you are putting your table name in the script, so when you run it, your database will create the new table, including the columns, triggers, and a stored procedure for the new index. You may also want to make a note of this table name because you will need to use this table name in subsequent tasks.

6. Execute the query.
7. Run a query to verify that you created the new index table.
   For example, run this query:
   ```sql
   select * from ck_uniform_title
   ```
Creating New MARC Maps for the Multiple-Source Index

Because a multiple-source collation key index extracts MARC information from more than one source table, you must use a MARC map for each table as part of the index definition. (For example, if you are creating a collation key uniform title index, you use one MARC map to extract information from the bib table, and another MARC map to extract information from the auth table.)

You may already have the MARC maps you need to use for the new index. If you do not, you need to create them. You need to understand MARC mapping and MARC records in order to do this.

This section explains how to create a MARC map for the auth table and a MARC map for the bib table.

This section explains these topics:

- Creating a Bib MARC Map for the Index
- Creating an Auth MARC Map for the Index

To create a bib MARC map for the index

<table>
<thead>
<tr>
<th>View:</th>
<th>marc_map</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process:</td>
<td>Administration\Index Control Menu\MARC Map Table</td>
</tr>
</tbody>
</table>

![Edit MARC Map](image)
In this field | Do this
---|---
Marc_map Code | Enter the code that identifies the MARC map. (For example, if you are creating a MARC map to extract bib information, your MARC map may be “stitle”.)
**IMPORTANT**
Assign this MARC map an “s” prefix for a bib based index. This distinguishes it from other MARC maps.

Description | Enter a description of the MARC map.

Search Limit? | Leave this box unmarked. Horizon uses this setting for search limiting MARC maps.

Sort Filter | Leave the **No Filter** button marked.

Run-on | Do one of these options:
- If you are creating a multiple tag index and you do not want the tags you extract to run together, leave the **Do Not Run-on** option marked.
- If you are creating a multiple tag index and you do want the tags you extract to run together, mark the **Do Run-on** option.
- If you are creating a single tag index, leave the **Do Not Run-on** option marked.

**NOTE**
When you create the index definition, you will mark the One Tag only box to specify that Horizon will extract and index only the result of the first tag. (For more information, see “Creating Two Index Definitions in the Table Editor” on page 4-87.)
### Creating a Multiple-Source Collation Key Index

In this field | Do this
--- | ---
Tag | Enter the tag you want the MARC map to extract information from.
Part | Enter the subfields or positions of the tag you want MARC map to extract information from.
Distinct Subfields | Do one of these options:
- If you want Horizon to treat all subfields as one entry, leave this box unmarked.
- If you want Horizon to treat each subfield in the extraction tag as a separate entry in the index or as a separate line in your display, mark this box.

This option is specifically for Indexing and Display MARC maps. (For example, this feature lets you make full use of the enhanced content notes in the 505 tag.)

**NOTE**

If you mark this option, you must make sure the Do Not Run-on option is also marked in the Run-on field for this MARC map.

Conditional Part | If you want to set a condition on the tag you are extracting, enter which part (subfield or fixed field position) must contain the conditional value in order for Horizon to extract any of the information in the specified tag.
Conditional Value | If you want to set a condition on the tag that you are extracting, enter the value the conditional part (subfield or fixed field position) must contain in order for Horizon to extract the MARC information.
First Tag: Prefix | Leave this field blank.
Suffix | Leave this field blank.
### In this field | Do this
---|---
Other Tags: Prefix | Leave this field blank.
Suffix | Leave this field blank.
HTML Format | Leave this field blank.

**NOTE**

Complete the fields in the Conditional group only if you need to set conditions for the entire MARC map. (For information on when to use this group, see “Understanding Conditional Parts of a MARC Map” in the “MARC Maps” section of the “General Setup” chapter in the *System Administration Guide*.)

| In this field in the Conditional group | Do this |
---|---|
Opening Paren. | If you are grouping several conditions in this MARC map together, enter a left parenthetical mark in the first entry for the group. |
Tag | Enter the tag you are setting up as the conditional tag. |
Part | Enter the subfields or positions of the conditional tag you want the MARC map to extract information from. |
Value | Enter the value that the conditional part (subfield or position) must contain in order for Horizon to extract any of the MARC information specified for the entire MARC map. |
<table>
<thead>
<tr>
<th>In this field in the Conditional group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closing Paren.</td>
<td>If you are grouping several conditions in this MARC map together, enter a right parenthetical mark in the last entry for the group.</td>
</tr>
</tbody>
</table>
| Operator                             | If you are creating several conditions in this MARC map and you want to use operators to relate the conditions together, do one of these options:  
  - Mark **None** if you are setting up only one condition on this MARC map.  
  - Mark **AND** if you are setting up multiple conditions on this MARC map and want to require that all the conditions must be met in order for the MARC map to extract any data from the extraction tags.  
  - Mark **OR** if you are setting up multiple conditions on this MARC map and want to require that only one of the conditions must be met in order for the MARC map to extract any data from the extraction tags. |
Chapter 4: Indexing

To create the auth MARC map for the index

View: marc_map
Process: Administration\Index Control Menu\MARC Map Table

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marc_map Code</td>
<td>Enter the code that identifies the MARC map. (For example, if you are creating a MARC map to extract auth information, your MARC map may be “Xauthor”.)</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the MARC map.</td>
</tr>
<tr>
<td>Search Limit?</td>
<td>Leave this box unmarked. Horizon uses this setting for search limiting MARC maps.</td>
</tr>
<tr>
<td>Sort Filter</td>
<td>Leave the No Filter button marked.</td>
</tr>
</tbody>
</table>
### In this field | Do this
---|---
Run-on | Do one of these options:
- If you are creating a multiple tag index and you do not want the tags you extract to run together, leave the Do Not Run-on option marked.
- If you are creating a multiple tag index and you do want the tags you extract to run together, mark the Do Run-on option.
- If you are creating a single tag index, leave the Do Not Run-on option marked.

**NOTE**
When you create the index definition, you will mark the One Tag only box to specify that Horizon will extract and index only the result of the first tag. (For more information, see “Creating Two Index Definitions in the Table Editor” on page 4-87.)

![Edit MARC Map](image)

### In this field | Do this
---|---
Tag | Enter the tag you want the MARC map to extract information from.
Part | Enter the subfields or positions of the tag you want MARC map to extract information from.
### In this field | Do this
--- | ---
Distinct Subfields | Do one of these options:
- If you want Horizon to treat all subfields as one entry, leave this box unmarked.
- If you want Horizon to treat each subfield in the extraction tag as a separate entry in the index or as a separate line in your display, mark this box.
This option is specifically for Indexing and Display MARC maps. (For example, this feature lets you make full use of the enhanced content notes in the 505 tag.)

**NOTE**

If you mark this option, you **must** make sure the Do Not Run-on option is also marked in the Run-on field for this MARC map.

Conditional Part | If you want to set a condition on the tag you are extracting, enter which part (subfield or fixed field position) must contain the conditional value in order for Horizon to extract any of the information in the specified tag.

Conditional Value | If you want to set a condition on the tag that you are extracting, enter the value the conditional part (subfield or fixed field position) must contain in order for Horizon to extract the MARC information.

First Tag: Prefix | Leave this field blank.

Suffix | Leave this field blank.

Other Tags: Prefix | Leave this field blank.

Suffix | Leave this field blank.

HTML Format | Leave this field blank.
Creating Two Index Definitions in the Table Editor

You must create two index definitions for a multiple-source collation key index. One index definition is for the bib table, and the other definition is for the auth table. Each index definition controls how the data is stored, what database table column stores the sorted data, the name of the index, and so forth. Once you create each index definition, you assign both of these indexes to one search option that displays in staff searching.

This section includes these topics:

- Creating the bib Index Definition in the Table Editor

---

**NOTE**

Complete the fields in the Conditional group only if you need to set conditions for the entire MARC map. (For information on when to use this group, see “Understanding Conditional Parts of a MARC Map” in the “MARC Maps” section of the “General Setup” chapter in the System Administration Guide.)

<table>
<thead>
<tr>
<th>In this field in the Conditional group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opening Paren.</td>
<td>If you are grouping several conditions in this MARC map together, enter a left parenthetical mark in the first entry for the group.</td>
</tr>
<tr>
<td>Tag</td>
<td>Enter the tag you are setting up as the conditional tag.</td>
</tr>
<tr>
<td>Part</td>
<td>Enter the subfields or positions of the conditional tag you want the MARC map to extract information from.</td>
</tr>
<tr>
<td>Value</td>
<td>Enter the value that the conditional part (subfield or position) must contain in order for Horizon to extract any of the MARC information specified for the entire MARC map.</td>
</tr>
<tr>
<td>Closing Paren.</td>
<td>If you are grouping several conditions in this MARC map together, enter a right parenthetical mark in the last entry for the group.</td>
</tr>
<tr>
<td>Operator</td>
<td>If you are creating several conditions in this MARC map and you want to use operators to relate the conditions together, do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark <strong>None</strong> if you are setting up only one condition on this MARC map.</td>
</tr>
<tr>
<td></td>
<td>• Mark <strong>AND</strong> if you are setting up multiple conditions on this MARC map and want to require that all the conditions must be met in order for the MARC map to extract any data from the extraction tags.</td>
</tr>
<tr>
<td></td>
<td>• Mark <strong>OR</strong> if you are setting up multiple conditions on this MARC map and want to require that only one of the conditions must be met in order for the MARC map to extract any data from the extraction tags.</td>
</tr>
</tbody>
</table>
Chapter 4: Indexing

- Creating the auth Index Definition in the Table Editor

To create the bib index definition in the Table Editor

**View:** mq_index  
**Process:** Administration\Index Control Menu\Indexes

![Edit Horizon Index Definitions](image)

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Mq Index               | Enter a code for the index.  
This is the code you assign to a specific search option.  
(For example, if you are creating an index for a collation key uniform title, you may enter “ckbib.”) |
| Description            | Enter a description for the index.  
(For example, if you are creating an index for collation key uniform titles, you may enter “Collation Key (bib)”.) |
| Index Table            | Enter the name of the index table you created on the database.  
This is the table that will store the data. This is the index table you created by running the SQL script. (For more information, see “Creating Database Objects for the Index” on page 4-77.) |
| Sort Col.              | Enter “sort_weight” as the sort column.  
This is the column in the new table that sorts the data. |
| Base Table             | Enter “bib” as source table for the raw data (the data you want to index). |
Creating a Multiple-Source Collation Key Index

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Base Index Col.        | Enter “text”.  
This is the column in the bib table where the index finds the raw data.  
You use the text column because it is the column in the bib table that contains the text of the MARC tags and subfields. |
| Key Col.               | Enter “bib#” as the column link from the index to the source record that is indexed. |
| Word Table             | Leave this field blank. |
| N_Keys Col.            | Leave this field blank. |
| marc_map               | Do one of these options:  
- If you created a new MARC map for the bib-based index, enter the code of the MARC map.  
  (For more information, see “Creating New MARC Maps for the Multiple-Source Index” on page 4-79.)  
- If you did not create a new MARC map for the bib-based index, enter the code for one of the existing MARC maps.  
A MARC map “tells” Horizon what subfields to pull from which tags under specific conditions for processing and inserting the data into the index table. |
| One Tag Only           | Mark this box.  
When you mark this, Horizon extracts and indexes only the result of the first tag in the MARC record. |
| Ignore Spacer for Indexing | Leave this box unmarked. |
| Show Author            | Leave this box unmarked. |
| Show Subject           | Leave this box unmarked. |
| Show Series            | Leave this box unmarked. |
| Index Type             | Choose the Multi-Source Collation-Key option.  
The index type controls what algorithm Horizon uses as it indexes. |
| Processor              | Enter the “UcSrtWt” processor.  
Horizon uses this processor for unicode browse indexes. |
### Chapter 4: Indexing

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Display Type           | Choose one of these options:  
  - **Staff-Only.** This displays only records with the Staff Only flag checked.  
  - **Public-Only.** This displays only records with the Staff Only flag cleared.  
  - **Combined.** This displays both staff-only and public-only records.  

  **NOTE**  
  The Staff-Only option is useful only if your library has public-only indexes defined. This is because both staff-only and combined indexes contain staff-only records. Only public-only entries filter out the staff-only records. |
| Queue                  | Enter a “0” (zero) in this field.  
  Horizon uses this value in Deferred Indexing. (For more information, see “Understanding Deferred Indexing” in the Cataloging Setup Guide.) |
| Stop Queue’s Indexer   | Leave this box unmarked.  
  Horizon uses this value in Deferred Indexing. |
| Sort Width             | Enter the number of bytes or characters on the database you want Horizon to sort.  
  If you used an SQL script to create your index table on the database, you should enter 250. (For more information on the SQL script, see “Creating Database Objects for the Index” on page 4-77.)  

  **IMPORTANT**  
  You must enter a value in this field, or the index will not work. |
Creating a Multiple-Source Collation Key Index

To create the auth-based index definition

**View:** mq_index  
**Process:** Administration\Index Control Menu\Indexes

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Mq Index               | Enter a code for the index.  
This is the code you assign to a specific search option.  
(For example, if you are creating an index for a collation key uniform title, you may enter “ckauth.”) |
| Description            | Enter a description for the index.  
(For example, if you are creating an index for collation key uniform titles, you may enter “Collation Key (auth)”.) |
| Index Table            | Enter the name of the index table you created on the database.  
This is the table that will store the data. This is the index table you created by running the SQL script. (For more information, see “Creating Database Objects for the Index” on page 4-77 of this 7.3.2 update.) |
| Sort Col.              | Enter “sort_weight” as the sort column.  
This is the column in the new table that sorts the data. |
| Base Table             | Enter “auth” as source table for the raw data (the data you want to index). |
### In this field or group | Do this
--- | ---
**Base Index Col.** | Enter “text”.  
This is the column in the auth table where the index finds the raw data.  
You use the text column because it is the column in the auth table that contains the text of the MARC tags and subfields.

**Key Col.** | Enter “auth#” as the column link from the index to the source record that is indexed.

**Word Table** | Leave this field blank.

**N_Keys Col.** | Leave this field blank.

**marc_map** | Do one of these options:  
- If you created a new MARC map for the auth-based index, enter the code of the MARC map.  
  (For more information, see “Creating New MARC Maps for the Multiple-Source Index” on page 4-79.)  
- If you did not create a new MARC map for the auth-based index, enter the code for one of the existing MARC maps.  
A MARC map “tells” Horizon what subfields to pull from which tags under specific conditions for processing and inserting the data into the index table.

**One Tag Only** | Mark this box.  
When you mark this, Horizon extracts and indexes only the result of the first tag in the MARC record.

**Ignore Spacer for Indexing** | Leave this box unmarked.

**Show Author** | Mark this box.

**Show Subject** | Leave this box unmarked.

**Show Series** | Leave this box unmarked.

**Index Type** | Choose the **Multi-Source Collation-Key** option.  
The index type controls what algorithm Horizon uses as it indexes.

**Processor** | Enter the “UcSrtWt” processor.  
Horizon uses this processor for unicode browse indexes.
### In this field or group

**Display Type**

Choose one of these options:
- **Staff-Only.** This displays only records with the Staff Only flag checked.
- **Public-Only.** This displays only records with the Staff Only flag cleared.
- **Combined.** This displays both staff-only and public-only records.

**NOTE**

The Staff-Only option is useful only if your library has public-only indexes defined. This is because both staff-only and combined indexes contain staff-only records. Only public-only entries filter out the staff-only records.

**Queue**

Enter a “0” (zero) in this field.

Horizon uses this value in Deferred Indexing. (For more information, see “Understanding Deferred Indexing” in the Cataloging Setup Guide.)

**Stop Queue’s Indexer**

Leave this box unmarked.

Horizon uses this value in Deferred Indexing.

**Sort Width**

Enter the number of bytes or characters on the database that you want Horizon to sort.

If you used an SQL script to create your index table on the database, you should enter 250. (For more information on the SQL script, see “Creating Database Objects for the Index” on page 4-77.)

**IMPORTANT**

You must enter a value in this field, or the index will not work.
Creating a View Definition for the Index

You create a view definition for the index in the Table Editor. The view definition lets data that you have indexed display in a window in Horizon. The view definition defines how, when, and where the indexed data displays in the Horizon window. A view definition defines the table where the data comes from, and where in the Horizon processes the data displays (for example, the Table Editor or staff searching). In addition, the view definition determines if staff can modify or add data in the view. It also specifies how Horizon sorts data in list window columns when users or staff click the Sort button.

In the view definition for a multi-source index, you set up these four columns in the List View group: original, n_bibs, see_flag, and see_also_flag
Creating a Multiple-Source Collation Key Index

To create a view definition for the index

**View:** mq_view  
**Process:** Administration\System Setup\View Control

---

In this field or group | Do this
---|---
Mq View | Enter a name for the new view. **IMPORTANT**
If the view you are creating displays data from the auth table, this is the format you **must** use for the view code in this field:
openauth_index code
This is the code you gave the index definition. (For more information, see “Creating Two Index Definitions in the Table Editor” on page 4-87.)

Description | Enter a description of the view.
(For example, you may enter “Uniform Title Collation List”.)

View Type | Choose “Authority List” to specify where in Horizon this window displays.

Table Name | Enter the name of the index table where data that you want to display is stored in the database.
This is the table that will store the data. This is the index table you created by running the SQL script. (For more information, see “Creating Database Objects for the Index” on page 4-77.)
### Chapter 4: Indexing

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window Title</td>
<td>Enter a title for the window. You should give the window a title that represents the type of information displayed. (For example, you could enter “Collation Uniform Titles”.)</td>
</tr>
<tr>
<td>Help panel id</td>
<td>Leave this field blank.</td>
</tr>
<tr>
<td>Properties</td>
<td>Mark both the Slice and Xrefs boxes. <strong>NOTE</strong>: Make sure none of the other Properties boxes are marked.</td>
</tr>
<tr>
<td>Secured</td>
<td>Leave this field blank.</td>
</tr>
</tbody>
</table>

**NOTE**

You complete the fields in this table for each of the four columns you add to the view definition. Save your changes after you add each column and click New create a new column.

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Column Name            | Enter the name of the column depending on the column that you are adding:  
  • original  
  • n_bibs  
  • see_flag  
  • see_also_flag  
These are the names of the columns from the index table where the indexed data is stored. |
### In this field or group

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ord</td>
<td>Enter the order in which you want the data in this column to display in the window in Horizon.</td>
</tr>
<tr>
<td>Column Label</td>
<td>Enter the name that you want to display as this column label in the list window.</td>
</tr>
<tr>
<td>No. of Display Characters</td>
<td>Enter the number of characters of the column data that you want to display.</td>
</tr>
<tr>
<td>Pad Character</td>
<td>Leave this box unmarked.</td>
</tr>
<tr>
<td>Properties</td>
<td>Mark the <strong>Displayed</strong> box to display data from this column in the window by default.</td>
</tr>
<tr>
<td>MARC Map</td>
<td>Leave this field blank.</td>
</tr>
<tr>
<td>Sort Processor</td>
<td>Enter “none”.</td>
</tr>
</tbody>
</table>

#### In this field

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Table         | Enter the name of the index table.  
This is the index table that you created by running the SQL script. (For more information, see “Creating Database Objects for the Index” on page 4-77.) |
| Column        | Enter “original”.  
This is the name of the column in the index table where the database stores the original MARC mapped data. |
| Data Type     | Mark the **Sort-Wt** option.  
This is the name of the column that sorts the data. |
| Reconst/Sw    | Enter “sort_weight”.  
This is the name of the column that sorts the data. |
Adding the New Index Definition to Your Search Options

After you have created an index, index definition, and view definition for the window that displays the data, you can add the new index definition as a new search option in staff searching. When you create a search option for the index, you provide accessibility to the indexed data. In addition, you also assign a view to the search option to display the indexed data. Once you create a search option for the index, the search option will display in the main search window in staff searching.

To add the new definition to your search options

| View: | search |
| Process: | Searching\PAC Control Menu\Search Option Table |

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALA Translate</td>
<td>Mark this box.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Enter the code for staff searching for this search option. The code for staff search options must be the same as the PAC flavor where this search displays.</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Index No.</td>
<td>Enter a number to specify the order in which this search option displays in the main search window in staff searching. The search options can appear in any order, but each search option in a specific PAC flavor must have a unique number. The default numbers start at 30 and increase in increments of five or ten. This lets you add additional search options before the default set or between entries in the default set as needed.</td>
</tr>
<tr>
<td>Label</td>
<td>Enter a descriptive name for the search option. This is the label that displays for the search option in the main search window. You should use a name that your library staff understands. (For example, you might enter “Collation Key Titles Browse”.)</td>
</tr>
<tr>
<td>Mq Index</td>
<td>Enter the names of the two Horizon index definitions that you created for the index. (For more information, see “Creating Two Index Definitions in the Table Editor” on page 4-87.)</td>
</tr>
<tr>
<td>This index contains</td>
<td>Enter the help text that you want to display for the search option in the main search window. (For example, you might enter “Collation Key Titles”.)</td>
</tr>
<tr>
<td>Example 1</td>
<td>Enter an example of a search string a user might enter for this search option. Users can view this example by clicking the Example button in the main search window.</td>
</tr>
<tr>
<td>Describe example 1</td>
<td>Enter a description of the search results for example 1.</td>
</tr>
<tr>
<td>Example 2</td>
<td>Enter another example of a search string a user might enter for this search option. Users can view this example by clicking the Example button in the main search window.</td>
</tr>
<tr>
<td>Describe example 2</td>
<td>Enter a description of the search results for example 2.</td>
</tr>
<tr>
<td>Display View</td>
<td>Enter the view that displays the search results. This is the view that displays the data. (For more information on the view you created, see “Creating a View Definition for the Index” on page 4-94.)</td>
</tr>
<tr>
<td>Z39.50 Use Attr.</td>
<td>If you are setting up your database so that Z39.50 server-compliant clients can search it, enter the Z39.50 use attribute. This assigns the search attribute to the search option.</td>
</tr>
</tbody>
</table>

**IMPORTANT**

You must enter a view in this field, or the index will not work.
Chapter 4: Indexing

Populating Your New Multiple Source Index Using ReIndex

You use the ReIndex utility to populate your new index table with data. Because your new index is populated from multiple sources (the bib and auth tables), you need to run the ReIndex utility twice—one for the bib table and once for the auth table.

You download this utility from the Support download page on the SirsiDynix customer web site on the Products/Horizon/Downloads/Upgrades at “clientcare.sirsidynix.com”. You run ReIndex from a command prompt. Before you run it, you add command-line arguments or “switches” to the ReIndex executable to set the type of index and the Horizon index code that your database builds.

To populate your new multiple source index using ReIndex

1. Close any running Horizon applications.
2. At a command prompt, go to the directory on the workstation where you downloaded the ReIndex executable.
3. Run this command to display a list of valid switches you can add to ReIndex:
   ReIndex.exe /?

   The Command Prompt displays these parameters:

   ![Command Prompt output showing ReIndex parameters]

   4. Enter this option at the command prompt to populate the bib index, followed by any optional switches you want to use:
      ReIndex.exe /server /p_password /u_user /d_database /m1 /i_indexcode

   5. Enter this option at the command prompt to populate the auth index, followed by any optional switches you want to use:
      ReIndex.exe /server /p_password /u_user /d_database /m2 /i_indexcode

   IMPORTANT: Do not attempt to run other Horizon applications on this workstation while ‘ReIndex’ is running... you can cause subtle, hard-to-fix corruption!

   NOTE: You must enter a space before the slash (/) character.
Applying Indexing Changes for French Databases

If you use a French database, you can specify that Horizon treats words with apostrophes (such as l’homme) as two words for indexing and searching. By default, Horizon removes apostrophes as it indexes. Because staff or borrowers might want to search for both l’ and homme, you can specify that Horizon replaces the apostrophe with a space.

**IMPORTANT**

This change affects your entire database. If you do this task, you will be changing all apostrophes into spaces for searching and indexing.

**To apply indexing changes for French databases**

1. Open your SQL query tool.
2. Connect to your French database.
3. Execute this script:

   ```
   update ipac_keyword_processor_map set output_string = '0020' where input_char = '0027'
   ```
Setting Up Horizon to Use 13-Digit ISBNs

Horizon can handle 13-digit and 10-digit ISBNs in its processes, if you set it up to do so. (For example, you can search on 10 or 13-digit ISBNs to retrieve the correct item. Or, ISBNs on BISAC orders and in a Vendor Integration Protocol request truncate the ISBN to ten digits when necessary.)

To set up Horizon to use 13-digit ISBNs

1. On a Horizon staff client workstation, open the mq_index view in the Table Editor.
2. Choose the ISBN index that you want to set up to support 10-digit and 13-digit ISBNs.

### IMPORTANT

The index you choose must use the “isbn” processor or (if you are using a custom processor) use a custom processor that supports 13-digit ISBNs. If you have a different processor, you should understand why you are using the other processor and decide if you want to use the “isbn” processor instead. If you do not want to change the index to use the “isbn” processor, then skip steps 3-6, and move on to the next ISBN index. If you want to, you can test the results of setting up the index to use the 13-digit ISBN by changing the processor to the “isbn” processor and completing the steps in this task. Then, do searching and other tasks with that index. If you do not want those results, you can change the processor back to the original and reindex that index again.


Marking this box guarantees that both a 13-digit ISBN and a 10-digit ISBN are in your index. (For example, if an ISBN is entered as a 10-digit ISBN, then Horizon generates the 13-digit version, and vice versa.) However, marking this box does not add the alternate ISBN to the MARC record.

4. In the Processor field, do one of these options:
   - If you are using the processors delivered with Horizon, be sure the processor is “isbn”.
   - If you are using a custom processor for ISBN indexes, be sure you are using that processor.

### IMPORTANT

If you have a custom processor for ISBN indexes, you must update the processor to handle the new 13-digit ISBN, or you will not see any of the 13-digit ISBN updates in the software.

5. Save your changes.
7  Repeat steps 2 through 6 for each ISBN index listed for Horizon Index Definitions that you want to support 13-digit ISBNs.

**IMPORTANT**

Do the following steps when your Horizon system is not being used or when your library has a period of low usage. This is because you must turn off transaction logging in order to reindex.

8  Turn off transaction logging.

If you do not turn off the transaction log, it may get full during reindexing and could lock reindexing and the Horizon system. To turn off transaction logging for both MS SQL and Sybase databases:

1  Close the Horizon Client programs on this Horizon client staff workstation.
2  Open an MS DOS window.
   To open an MS DOS window, choose Start, Run, enter “cmd” and press ENTER.
3  Change to the upgrade directory.
   The default is C:\horizonupgrade\upgrad74.
   For example, enter this command on one line:
   `cd c:\horizonupgrade\upgrad74`
4  Enter this command on one line at the prompt:
   `setdbopt /sserver /ppassword /uuser /ddatabase /otrunc /ttrue`
   For example:
   `setdbopt /shorizon /pnice /usa /dhorizon /otrunc /ttrue`

9  Reindex the ISBN indexes that you modified.
To run reindex for the selected ISBN Indexes:

1. In the MS DOS window, change to the upgrade directory, if you are not already there.
   The default is C:\horizonupgrade\upgrad74.
   For example, enter this command on one line:
   ```bash
cd c:\horizonupgrade\upgrad74\n```
2. Enter this command on one line at the prompt:
   ```bash
   Reindex /sserver /ppassword /uuser /ddatabase /m1 /iindexname,indexname,indexname
   
   For example, using the common index names isbn, isbnb, isbnkw (which represent isbn, isbn alphabetical, isbn key word indexes), you might enter this command on one line:
   ```bash
   Reindex /shorizon /pnice /usa /dhorizon /m1 /isisbn,isbnb,isbnkw
   ```
   The “/m1” indicates that these are bib-based indexes. The server name to use is the same server name as when you log into the Horizon client programs.
3. Let this process run until you return to the MS DOS prompt.

10. Turn on transaction logging.

To turn on transaction logging for both MS SQL and Sybase databases:

1. In the MS DOS window, change to the upgrade directory, if you are not already there.
   The default is C:\horizonupgrade\upgrad74.
   For example, enter this command on one line:
   ```bash
cd c:\horizonupgrade\upgrad74\n```
2. Enter this command on one line at the prompt:
   ```bash
   setdbopt /sserver /ppassword /uuser /ddatabase /otrunc /tfalse
   
   For example:
   ```bash
   setdbopt /shorizon /pnice /usa /dhorizon /otrunc /tfalse
   ```
3. If your library requires and uses transaction logging, make a full database backup of the database that you just ran reindex against using your normal procedures for making a SQL database backup.
   This will allow the transaction backup process to resume again.
Security and Preferences

This chapter explains how to set up security and preferences for users on your Horizon system.

- About Security and Preferences 5-3
- Securing Horizon 5-3
- Setting Up Preferences for Users 5-63
About Security and Preferences

Horizon is a secure application that protects itself and your library data against unauthorized access and misuse. No one can access Horizon or perform any of the processes within it until you give them rights to do so. This chapter explains how to use Horizon’s security features to give your staff the access they need.

In addition, this chapter explains how to use Horizon to set up preference groups to control the appearance, functionality, and workflow for a specific user or a group of users. (Part of the preferences discussion is an explanation of the switches that you can use to activate various features in the Horizon processes.)

Securing Horizon

Horizon’s security features are powerful and flexible. They give you almost unlimited possibilities for controlling what users can access and change. While there is some work involved in setting up security initially, the process for making changes is relatively simple and easy to administer. This process is especially helpful for libraries that have a large number of users who require various levels of access.

Be aware that the security settings you define in Horizon are bypassed when users access the Horizon database using third-party products, such as SQL Advantage or Crystal Reports. You define database access in your database server software, independent of the security settings you define in Horizon. Restrictions at the database level that are in conflict with rights you grant in Horizon will override the rights in Horizon.

The sections that follow give you the information you need to set up and maintain your security settings:

- “About Security” introduces the elements of Horizon security and explains how they work together to grant or restrict rights. If you are new to Horizon security, read this section before you set up or update your security settings.
- “Setting Up Security” walks you through each task you must complete to set up Horizon security. This section is geared to system administrators who are setting up security for the first time, but it is also applicable if you are making changes to your initial set up.
- “Updating Security” provides a quick reference for all the security-related tasks you may need to perform after security is set up initially.
- “Security Details” provides additional information about Horizon security. It includes a list of all the secured processes in Horizon.

About Security

You set up Horizon security by defining the users who have access to your system, the processes they have access to, and the information they can change. You accomplish this through the use of users, roles and passkeys, ownerships, and groups. This section explains each of these elements and how they work together to grant or restrict rights.

This section explains these topics:

- Overview
- Users
- Roles and Passkeys
- Ownerships
Overview

This diagram shows the relationship between Horizon security elements and how they work together to grant rights to users:

Figure 5.1: Horizon Security

As shown in this diagram, Horizon uses both old and new security elements. Passkeys grant access to processes that are secured under the old security system. Groups grant access to processes and data that are secured under the new security system.

To give a user access to processes that are secured under the old security system, you assign privileges to a passkey and then assign the passkey to the user. To give a user access to processes and data that are secured under the new security system, you assign privileges and CRUDO settings (when needed) to a role, assign role/owner pairs to a group, then assign the user to the group.

Roles combine privileges and, in some cases, CRUDO settings to provide predefined sets of rights that you can assign to groups. Groups combine ownerships with roles to restrict the rights defined in roles to specific sets of records.
Each of the security elements in this diagram is explained in detail in the next several pages. As you read about each element, refer back to this diagram as needed to understand how the elements function in the overall context of Horizon security.

Users

A user is a person or group of people who have access to Horizon. You create a user record for each user. The user record defines the user’s login name and password, security settings, user defaults, and other information about the user. It also includes options to help you manage users. (For example, you can temporarily deny a user from accessing Horizon, or you can expire a user’s password.)

Roles and Passkeys

A role is a set of rights that you can make available to one or more users. You can define roles in Horizon according to the roles that exist in the library and the rights you want for each role. (For example, you can define roles for cataloging, circulation, acquisitions, or any other category you choose.)

A passkey is an earlier version of a role. Like a role, a passkey defines a set of rights that you can assign to one or more users. However, passkeys are more limited than roles. You can assign only one passkey to a user, but a user can have multiple roles.

Passkeys give users access to processes that are secured with an earlier security system. With future Horizon releases, these processes will be updated for use with roles instead. Until then, you will need to use both passkeys and roles to grant rights to users.

Roles and passkeys use privileges and permissions. Roles also use CRUDO settings. Privileges, permissions, and CRUDO settings are explained below:

Privileges

A privilege is the right to access a secured process. You assign privileges to roles and passkeys to give users access to Horizon processes. There are hundreds of secured processes in Horizon (for example, the process for canceling a hold in Circulation and the process for creating a bib record in Cataloging, to name two). With future Horizon releases, role privileges will replace most, if not all, passkey privileges. (For a list of passkey privileges, see “Passkey Privileges” on page 5-50. For a list of role privileges, see “Role Privileges” on page 5-58.)

Permissions

A permission defines the level of access for role and passkey privileges. There are three permissions:

- **Full.** Grants the privilege to users without further approval. For role privileges, you assign this permission by choosing “Full” when you add a privilege to a role. For passkey privileges, this permission is assumed for users by default for privileges assigned to them.

- **Approval Required.** Requires users to get permission before they are granted access to the privilege. For role privileges, you assign this permission by choosing “Approval Required” when you add a privilege to a role. For passkey privileges, this permission is assumed for users by default for privileges not assign to them.

When a user’s permission for a privilege is Approval Required, Horizon prompts the user for a user name and password when he or she tries to access the privilege. This prompt lets another staff member (such as a supervisor) grant the user access by entering his or her user name and password. If the new user has the needed rights, the user is allowed to proceed. This action does not change the current user; it simply grants the original user
one-time access to the privilege. Approval must be given each time the user attempts to access the privilege.

- **None.** Applies to role privileges only. Gives users no access to the privilege, and hides the element used to activate the process from the user interface. This is an implicit permission (that is, you do not explicitly set this permission in the user interface). Users have this restriction for all role privileges not assigned to them.

**NOTE**

Processes controlled by role privileges are not displayed to a user until (or unless) you grant the corresponding privileges to the user.

Processes controlled by passkey privileges are displayed even if you have not given the user right to the process. However, the user cannot execute the process without getting approval first.

**CRUDO Settings**

CRUDO settings define rights for editing records of a certain type. **CRUDO** is an acronym for the rights you can assign. They are Create, Read, Update, Delete, and Owner change (that is, the right to change the owner assigned to a record). (For information about owners, see “Ownerships” below.)

You can use CRUDO settings with bibliographic records, authority records, and workforms; they may be available with other record types in future Horizon releases. You assign CRUDO settings to one or more roles as necessary to grant these rights to users. CRUDO settings are available for roles only; they are not available for passkeys.

**Ownerships**

Some libraries may want to restrict rights for editing records according to who “owns” the records. For example, a multi-branch library may want to restrict rights so staff at one branch cannot make changes to records belonging to another branch. Or a library may limit access to bib records by collection to restrict cataloging privileges to the individuals responsible for the development of those collections.

Restricting access in this way is referred to as **record ownership**. The basic concept is this: You assign owners to records—rights for accessing or editing a record are then restricted to users who have rights for the owner assigned to the record. Users are granted rights by ownership according to the role/owner pairs assigned to groups. (For more information, see “Groups” on page 5-7.)

An ownership lets you restrict a user’s rights to a certain subset of records (or, to use database terminology, to specific rows in a table). (For example, you can restrict a user’s rights for bib records to bibs that belong to your library’s juvenile collection.) Ownerships are currently used with bibs, authorities, workforms, and user, role, and group records; they may be used with other record types in future Horizon releases.

The definition of an owner is anything you want it to be, according to the groups of records whose access you want to restrict. (For example, an owner might be a library, a branch, an individual, a group of people, a department, an item type, a collection, or group of collections.) The software does not restrict you in any way.

Record ownership is optional; however, if you choose not to use record ownership, you still need to use the default owner of “Unowned” for records that require an owner. (For information about using the Unowned ownership, see “Planning Ownerships” on page 5-14.)
Groups

A security group consists of one or more users who share the same set of rights. Groups generally correspond to staff positions at the library (for example, cataloger, cataloging supervisor, circulation clerk, or circulation supervisor). Groups link users to roles and ownerships. You assign users and roles to groups according to the rights you want for each user.

When you assign a role to a group, you associate the role with an ownership to limit role privileges and CRUDO settings to records of that ownership. (Note that rights are limited only for processes that use record ownership.) This association of a role and an ownership in a group is referred to as a role/owner pair.

Security groups are different from preference groups. Preference groups define user preferences (shortcut keys, toolbars, startup processes, etc.). The users you assign to a security group may or may not belong to the same preference group. (For information about preference groups, see “Setting Up Preferences for Users” on page 5-63.)
Granting Rights to Users

This section provides examples for how you might use roles, groups, and ownerships to grant or restrict rights. It also explains how the order of precedence between security elements determines what rights are granted. Finally, it introduces security levels and explains how they are used to limit the privileges that can be granted to users via roles and groups.

This section explains these topics:

- Example 1: Using Roles and Groups
- Example 2: Using Record Ownership
- Hierarchy of Rights
- Security Levels

Example 1: Using Roles and Groups

To understand how you might define roles and groups, consider the following example: Suppose you are defining access for a staff that includes catalogers, circulation clerks, supervisors, and a site administrator. To grant each member appropriate access based on job responsibilities, you might create the following roles and groups and assign the users and roles to the groups in this way:

Figure 5.2: Roles and Groups

As shown in this example, you define users and roles, then assign users and roles to groups to give users the access they need. (The roles are actually role/owner pairs, but record ownership is not considered in this example.) Remember that a role defines a set of privileges (for example, a privilege for canceling a hold request or creating a bib record). The individual privileges are not shown in this example.

You can assign a role to more than one group. (For example, the System Basic role is assigned to Cataloging Staff and Circulation Staff to give all users access to basic processes.) You can also assign a user to more than one group. Since Yolanda is a cataloging supervisor, she is assigned to...
both Cataloging Staff and Cataloging Supervisors. Richard, the site administrator, is assigned to all groups, giving him all cataloging, circulation, and supervisory rights.

Although not shown in the diagram, you assign individual privileges only once—to the role. This reduces the data entry required to grant privileges to users. You should define your roles carefully to make them applicable to as many groups as possible and to minimize the number of times you must assign a privilege to more than one role. In this example, privileges for basic tasks are assigned only once—to the System Basic role. However, the privileges are available to all users because of how the role and the users in this example are assigned to groups.

Once you have set up your roles and groups, making changes is easy. (For example, to grant rights to a new cataloger, all you need to do is create a user record and assign the user to the Cataloging Staff group.) Or, suppose you want to give your catalogers access to basic circulation processes. To do this, you would simply assign the Circulation Basic role to the Cataloging Staff group. All the users assigned to the group now have access to the privileges included in this role.

As this example shows, roles and groups provide a great deal of flexibility for granting rights to users. You can assign one or more roles to one or more groups, and one or more users to one or more groups, as needed. Groups provide an extra level of organization that make the administration of privileges more flexible and easier to change, especially if you have many users who need various levels of access. Groups also provide an efficient method for granting rights by ownership, as shown in the next example. Smaller libraries that do not have these requirements may simply create one role per group in many instances.

NOTE

The purpose of this example is to give you an idea of what you can do with roles and groups. You can define your own roles and groups however you want to, according to the needs of your library.

NOTE

If a user has multiple roles and there are conflicting rights between roles (specifically, conflicting permissions or CRUDO settings), the higher rights always take precedence. (For example, if a user has a permission of Approval Required for a privilege in one role, but a permission of Full for the same privilege in another role, the Full permission is granted.)
Example 2: Using Record Ownership

To understand how you might use record ownership to restrict rights to specific sets of records, consider the following example: Suppose your library has three locations and you want to restrict access to bib and authority records by location. You might define owners, roles, and groups this way:

Figure 5.3: Ownerships

In this example, the two roles include CRUDO settings to provide access to bib and authority records. One provides full rights for accessing and editing records; the other provides view-only rights. Notice the “Role/Owner Pairs” assigned to groups 1 and 2. As shown in Figure 5.1: Horizon Security on page 5-4, you associate a role with an ownership when you add the role to a group. For processes that use record ownership, this restricts the rights defined in the role to specific sets of records (specifically, records owned by the owner you associated with the role). Notice that you can assign a role to a group multiple times, but only once per ownership.

In this example, Mary and Bill have editing rights for bib and authority records owned by libraries A and B, and view-only rights for records owned by Library C. Hosea has editing rights for records owned by Library C, but has view-only rights for records owned by libraries A and B. Notice that Jane is assigned to both groups, which means she has editing rights for all records. Jane’s higher privileges take precedence. Her full cataloging roles for libraries A and B in the Group 1 override her view-only cataloging roles in Group 2, and her full cataloging role for Library C in Group 2 overrides her view-only cataloging role in Group 1.

Hierarchy of Rights

In the new security system, Horizon uses the following order of precedence to determine whether or not a user has access to processes and data:

1 Privilege
2 Permission
3 Ownership
4 CRUDO
First, Horizon determines whether the user has rights to the privilege. Second, Horizon may limit the privilege based on permission (Full or Approval Required). Third, for processes that use record ownership, Horizon determines whether the user has rights for the current record based on the user’s role/owner pairs. Finally, Horizon may further restrict rights for editing the record based on CRUDO settings.

Security Levels

In general, security levels limit the privileges that can be granted to users via roles and groups. You assign security levels to role privileges, users, roles, and groups. Here are the security levels, shown in order of most access to least access:

- **Sys Admin.** Intended for the library system administrator only. When assigned to a user, gives the user full access to all role privileges and to all data immediately. No other setup is required except to give the user access to processes controlled by passkeys. This security level is unique in that it grants rights; the other security levels simply limit the privileges that can be granted to users.

- **Local Admin.** Intended for local system administrators who need access to privileges that require a high level of security.

- **Supervisor.** Intended for supervisors who need access to certain privileges not available to general staff.

- **Staff.** Intended for general staff who need access to only basic, job-related functions.

- **Guest.** Intended for individuals to whom you want to grant only very limited access. (For example, a college library may use this security level for faculty who need to perform a limited number of tasks, such as entering purchase requests in Acquisitions or checking on the status of orders.)

The security level you assign to a role limits the privileges that can be assigned to the role. (For example, a role with a security level of Staff means that only privileges with a security level of Staff or Guest can be assigned to the role.)

The security level you assign to a group limits the users and roles that can be assigned to the group. (For example, a group with a security level of Supervisor means that only users with a security level of Supervisor or Local Admin can be assigned to the group. Users with a security level of Sys Admin could also be added to the group, but this is not necessary since these users are given rights to all role privileges and all data automatically. Also, only roles with a security level of Supervisor or lower can be added to the group.)
Chapter 5: Security and Preferences

Setting Up Security

This section walks you through each task you must complete to set up Horizon security. It explains how to set up user definitions and grant rights to users with passkeys, roles, ownerships, and groups. If you are setting up security for the first time, you should complete the tasks in the order presented.

NOTE

If you have not already done so, read “About Security” on page 5-3 before you continue.

The information in this section is tailored for system administrators who are setting up security for the first time. However, you can also use these instructions after initial setup to add new users or to change security settings as needed. Simply refer to the tasks that apply to what you need to change. (For more information about updating security settings, see “Updating Security” on page 5-36.)

This section explains these topics:

- Task 1: Make a Plan
- Task 2: Set Up Passkeys
- Task 3: Set Up Record Ownership
- Task 4: Review Security Levels
- Task 5: Set Up User Definitions
- Task 6: Set Up Roles
- Task 7: Set Up Groups

Task 1: Make a Plan

Before you begin creating security elements in Horizon, SirsiDynix recommends that you first plan out what you need on paper. You need to think about how responsibilities are (or should be) divided among library staff and how you will define security elements in Horizon accordingly. Who should be given access to what? What passkeys, roles, and groups are needed? Will you implement record ownership? This section gives you some guidelines for creating a plan and discusses issues that may affect how you define security elements. Note that your plan does not need to be exhaustive, and that you can always make changes after you start creating the elements in Horizon.

This section explains these topics:

- Planning Users
- Planning Passkeys
- Planning Roles and Groups
- Planning Ownerships
Planning Users

1. Write down a list of users who need access to Horizon.

   In general, you need a user definition for each member of your library staff. However, you may want to use a single user definition for a group of people who share the same basic tasks, such as circulation clerks. (For example, you might create a user called “circdesk1” and always use this user for workstation #1 at the circulation desk. This prevents circulation staff from having to log in separately and change users frequently when doing circulation tasks.)

2. Note the security level you want for each user.

Planning Passkeys

1. Write down a list of passkeys you need based on the passkey privileges you need to grant to users.

   As you create your list, review your list of users and the list of passkey privileges on page 5-50 to help you determine what passkeys you will need. You can finish the specific assignment of privileges to passkeys when you create the passkeys in Horizon. Right now, you just need a pretty good idea of what passkeys you need.

   Keep in mind that you can assign a passkey to more than one user, but a user cannot have more than one passkey. This means a user’s passkey must include all the passkey privileges he or she needs access to, and that you can use the same passkey only for staff members who require the exact same set of passkey privileges.

2. Note the passkey you will assign to each user.

Planning Roles and Groups

1. Write down a list of roles you need based on the roles that exist in the library and the sets of rights you want to be able to assign to groups. Note the security level you want for each role.

   To help you determine what roles you will need, think about the roles that exist in the library. Keep in mind that a role may be applicable across multiple staff positions. Also review the list of role privileges on page 5-58. You can finish the specific assignment of privileges to roles when you create the roles in Horizon. Right now, you just need a pretty good idea of what roles you need.

2. Make a note of roles that will require CRUDO settings to grant cataloging privileges to users.

   It may be helpful to create one or more roles that define CRUDO settings only (no role privileges). You can then assign these roles to groups as necessary. Note that you can vary the CRUDO settings from role to role to provide different sets of rights (for example, read-only rights, limited editing rights, or full rights).

3. After you have an initial list of roles, write down a list of groups and note the users and roles you will assign to each group. You may need to make several changes as you refine your plan. Also note that security level you want for each group.
As you create your list of groups, keep in mind that groups generally correspond to staff positions (for example, cataloger, cataloging supervisor, circulation clerk, or circulation supervisor). Groups let you combine roles according to the various combination of privileges you need for your users.

Define your roles and groups carefully to minimize the number of times you must assign a privilege to more than one role. In general, keep your roles small and as applicable to as many groups as possible. Keep in mind that a user can have multiple roles. (Specifically, you can assign multiple roles to a group, and you can assign a user to multiple groups.) This means that roles, unlike passkeys, can define sets of rights that are common across different positions. Instead of duplicating the same privileges in many roles, you can often assign privileges to one role and then assign the role to multiple groups as needed. (For examples, see Figure 5.1: Horizon Security on page 5-4.)

Planning Ownerships

1 Decide whether or not you will use record ownership to restrict users’ rights to specific sets ofbibis, authorities, or workforms; or user, role, or group records.

   If you decide not to use record ownership, simply use the default owner of “Unowned” for records that require an owner. Also, use Unowned when you assign a role to a group. As long you do not assign any other owners to your records, rights will be granted to users for all records.

2 If you decide to use record ownership, write down a list of owners you will use based on the sets of records whose access you want to restrict.

   Define owners carefully. Keep in mind that defining too many ownerships may create confusion and add a lot of overhead for maintaining ownership assignments and for granting rights by ownership.

   Also be aware that the software does not provide any context for the owners you define. For example, suppose a user is changing the owner assigned to a bib record. The Owned By drop-down list in the control record for the bib shows all of the owners (for which the user has rights), including owners you may have defined for use with other record types. Consequently, it may be unclear which owners are applicable for bib records.

   In these cases (where ownerships are different by record type), you may want to provide the context in the owner descriptions (for example, “Library A - Bib Records”). You should also establish policy and train staff members as needed.

   Include the Unowned owner in your list of owners. You will need to use this owner for records that you do not assign to any other owner. The Unowned owner functions like any other owner. You must grant access to records of this ownership the same way you do for records of other ownerships (through role/owner pair assignments).

3 Using the list of roles you created earlier, write down a list of role/owner pairs for each group according to how you want to restrict rights by ownership.

   (For examples, see “Example 2: Using Record Ownership” on page 5-10.) Remember that a user’s rights are restricted by ownership according to the role/owner pairs that are assigned to the groups to which he or she belongs.

   Remember to define role/owner pairs that include the Unowned owner, as needed, to grant access to records assigned to the Unowned owner.

Be aware that rights are restricted by ownership only for Horizon processes that use record ownership. Many processes do not use record ownership. (For example, searching does not use record ownership. All users can search on all bib records, unless you have restricted access using the Staff Only setting; however, a user’s ability to edit those bib records may be limited by ownership.)
Currently, record ownership is used for these cataloging and security processes:

<table>
<thead>
<tr>
<th>Cataloging processes that use record ownership</th>
<th>Security processes that use record ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td>• MARC Editor (CRUDO processes for bib and authority records)</td>
<td>• Role Manager</td>
</tr>
<tr>
<td>• Workforms (CRUDO processes for workforms)</td>
<td>• User Manager</td>
</tr>
<tr>
<td>• Create New Bib, and Create New Auth (both MARC and non-MARC processes)</td>
<td>• Group Manager</td>
</tr>
<tr>
<td>• Merge Bib</td>
<td></td>
</tr>
<tr>
<td>• Export Bib</td>
<td></td>
</tr>
<tr>
<td>• Import Bib</td>
<td></td>
</tr>
<tr>
<td>• Bib Linking processes</td>
<td></td>
</tr>
</tbody>
</table>

**Task 2: Set Up Passkeys**

Using the list of passkeys you defined in task 1, follow the steps in this task to set up the passkeys in Horizon. You will assign the passkeys to users later in task 5.

You can assign three types of privileges to passkeys:

- **View privileges.** Grant access to secured list and edit windows (such as the List Borrower and Edit Borrower windows). (For a list of view privileges, see “Views” on page 5-50.)

- **Stand-alone program privileges.** Grant access to Horizon processes that are delivered as separate executables, such as Day End Processes and Self-serve Checkout. They are called “stand-alone” programs because you can run them on their own (from a command line), outside of the Horizon Launcher. Note that some of these processes, however, still require that Horizon is running. (For a list of stand-alone program privileges, see “Stand-alone Programs” on page 5-52.)
• **Program Feature privileges.** Control access to Horizon processes (for example, the process for canceling a hold or creating an item record, to name two). (For a list of program feature privileges, see “Program Features” on page 5-53.)

**To set up passkeys**

1. Start the **Pass Key Manager** process.

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

   Horizon displays the Pass Key Manager window.

2. Click **New** to display the Pass Key window.

   Here is an example of a completed window:

   ![Pass Key Window](image)

   - **Views**
   - **Stand-alone Programs**
   - **Program Features**

   **Views Allowed:**
   - Biblic Category Codes for Elements
   - Biblic Co-Tags Definitions
   - Biblic Co-Tag Subfield Definitions
   - Biblic Compound Subfield Definitions
   - Biblic Subfield Definitions
   - Biblic Tag Definitions
   - Non-MARC Field Definition
   - Non-MARC to MARC mappings
   - Non-MARC Workform Definition
   - Non-spacing Chars of ALA Charset
   - Summary of Holdings
   - Title Restriction (for PAC)
   - Workform Edit for Cataloging

   **Pass Key:** \( \text{passkey} \)

   **Description:** Cataloging Staff

   **Add**

   **Remove**

   **Prev**

   **Next**

   **Delete**

   **Save**

   **Close**
3 Complete these fields in the window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pass Key</td>
<td>Enter a short name or code for the passkey. This name is used as the record ID and cannot be identical to any other passkey name you define.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the passkey. Enter a description that will help you remember who the passkey is for (for example, Full-Time Circulation Staff, Part-Time Circulation Staff, Full Access).</td>
</tr>
</tbody>
</table>

4 To add view privileges, do these steps:

1 Click **Add** to display the Add Views window. This window displays a list of all the views you can assign to a passkey.
2 Highlight the views you want to add to the passkey. Use the SHIFT and CTRL keys as necessary to highlight multiple items in the list. (To highlight adjacent items, click the first item, press and hold the SHIFT key, then click the last item. To highlight non-adjacent items, press and hold the CTRL key and click the items you want.) Press CTRL+A to highlight all the items in the list.
3 Click **Add**. Horizon adds the views to the passkey.
4 Click **Close**.

5 To add stand-alone program privileges, do these steps:

1 Click the **Standalones** tab.
2 Click **Add** to display the Add Standalones window.
3 Highlight the stand-alone processes you want to add to the passkey. Use the SHIFT and CTRL keys as necessary to highlight multiple items in the list. Press CTRL+A to highlight all the items in the list.
4 Click **Add**. Horizon adds the stand-alone processes to the passkey.
5 Click **Close**.
To add program feature privileges, do these steps:

1. Click the **Program Features** tab.
2. In the **Category** drop-down list, choose the category that corresponds to the type of program features you want to add:
   - acq = Acquisitions
   - acqman = Acquisitions Manager
   - booking = Advanced Booking
   - cat = Cataloging
   - crc = Circulation
   - mrt = Table Editor
   - pui = Searching
   - rbr = Reserve Bookroom
   - request = Managing Requests
   - ser = Serials
3. Click **Add** to display the Add Program Features window.
   Horizon displays a list of program features for the category you chose.
4. Highlight the program features you want to add to the passkey.
   Use the SHIFT and CTRL keys as necessary to highlight multiple items in the list. Press CTRL+A to highlight all the items in the list.
5. Click **Add**.
   Horizon adds the program features to the passkey.
6. Click **Close**.
7. Repeat these steps to add program features for other categories as needed.
8. Save the passkey.
9. Repeat steps 2 through 7 for each additional passkey you want to create.

**Task 3: Set Up Record Ownership**

Setting up record ownership consists of three tasks: first, defining the owners you want to use; second, assigning those owners to records; and third, associating roles with owners. The first two tasks are explained below. The third is explained later in task 7.

**Task 3.1: Define Owners**

Using the list of owners you created in task 1, follow the steps in this task to define the owners in Horizon.
To define owners

1. Start the **Ownership Manager** process.
   The default location of this process is the **Administration\Security Menu** folder on the navigation bar.
   Horizon displays the List Owner window.

2. Click **New** to display the Edit Owner window.
   Here is an example of a completed window:

   ![Edit Owner Window]

   3. Enter a short code for the owner in the **Entry Code** field.
   4. Enter a description of the owner in the **Descr** field.
   5. Save your changes.
   6. Repeat steps 2 through 5 for each additional owner you want to create.
   7. Close the **List Owner** window.
   8. After you finish creating owners, you must exit Horizon and log back in before you can assign the owners to records.

**Task 3.2: Assign Owners to Records**

After you define the owners you want to use, you need to assign the owners to individual records. To assign owners to your existing records, use SQL commands to select and update multiple records at once. You can do this with any SQL tool (such as SQL Advantage for Sybase databases). If you are using record ownership for security records (users, roles, and groups), you can assign the owners as you create these records, as explained in later tasks.

You also need to assign owners on an ongoing basis as you create new records. You and your staff members do this by completing the “Owned By” fields on records that use record ownership. To ensure that owners are assigned correctly, you should establish policy and train staff members as needed.

You can define a default owner for users on the user record (as explained in task 5). This value determines the default owner that Horizon assigns to records created by the user. (Note that for certain records, this default may be overridden by another setting. For example, for bib and authority records, the default owner on the bib or authority workform is used instead.) A user can change his or her default owner at login. A user can also change the
owner assigned to a record. In both cases, the owners that are available for the user to choose from are limited to owners for which the user has rights, based on the role/owner pairs assigned to groups to which the user belongs.

**Task 4: Review Security Levels**

Horizon comes with a default security level for each role privilege. However, you may want to review the default levels and make changes if needed. The security level you assign to a privilege determines the roles to which it can be assigned. (For example, a security level of Staff means you can assign the privilege to roles with a security level of Staff or higher. For more information about security levels, see “Security Levels” on page 5-11.)

---

**IMPORTANT**

Raising a privilege’s security level may restrict it from roles to which it has already been assigned (if any). If so, Horizon removes the privilege from the role. However, be aware that Horizon does not warn you before removing the role.

---

To review security levels

1. Start the Privilege Manager process.
   The default location of this process is the Administration\Security Menu folder on the navigation bar.
   Horizon displays the List Privilege Manager window.
2. Review the security levels assigned to each privilege.
3. If you want to change the security level for a privilege, do these steps:

   1. Double-click the privilege.
   2. In the Security Level field, choose the level you want:
      - **Sys Admin.** Restricts the privilege from all roles. Only users with a security level of Sys Admin can access the privilege.
      - **Local Admin.** Restricts the privilege to roles with a security level of Local Admin or higher.
      - **Supervisor.** Restricts the privilege to roles with a security level of Supervisor or higher.
      - **Staff.** Restricts the privilege to roles with a security level of Staff or higher.
      - **Guest.** Makes the privilege available for all roles.
   3. Save your changes.
4. Repeat step 3 for each privilege whose security level you want to change.
Task 5: Set Up User Definitions

Using the list of users you created in task 1, follow the steps in this task to set up a user definition for each user. You will assign one of the passkeys you set up in task 2 to each user. You will assign the users to groups later in task 7.

To set up user definitions

1 Start the User Manager process.
   The default location of this process is the Administration\Security Menu folder on the navigation bar.
   Horizon displays the User Manager window.

2 Do one of these options:
   • To create a user from scratch, click New.
   • To create a user by copying an existing one, highlight the user you want to copy and click Copy.
   Horizon displays the User window. Here is an example of a completed window:

3 Complete these fields in the window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| User          | Enter a login name for the user.  
   This is the name the user enters to log in and is the name used to identify the user in Horizon. The name cannot be identical to any other login name you have defined. It can contain up to 30 characters and can include spaces and special characters. (Use ASCII characters only; Unicode is not supported.) Once you save the user record, you cannot change the login name without deleting the record and re-creating it with the new name. |
### In this field | Do this
---|---
**User Name** | Enter the user’s full name.  
If you are creating a user for use by more than one person, enter a description of the users. Enter the name or description as you want it to appear on screen and in reports.

**User Owned By** | Choose an owner for the user record.  
Access to the user record is restricted to users who have the User Manager privilege for the owner you choose (based on the role/owner pairs assigned to groups). If your library is not using record ownership for user records, use the default **Unowned** owner. (For information about owners and record ownership, see “Ownerships” on page 5-6 and “Planning Ownerships” on page 5-14.)

**User Password** | Enter a password for the user. (Use ASCII characters only; Unicode is not supported.)  
After you move the cursor to another field, Horizon prompts you to re-enter the password to ensure you entered it correctly. Re-enter the password and click **OK**.  
For security purposes, Horizon displays asterisks ( *) in place of the actual password. Also, the next time you open the record, Horizon displays 15 asterisks in this field regardless of the actual length of the password. If you need to change the password, you will need to re-enter the entire password.

**Password change required at next logon** | Mark this box to require the user to change the password the next time he or she logs in.  
Using this option has several advantages. First, it makes things easier for you because you can use the same initial password for each user. Second, only the user knows the final password. Finally, since you do not communicate the final password to the user, there is no risk of it being intercepted by someone else. Horizon clears this box after the user changes the password.

**Self Password Change** | You can enable a user to change their password. You enable this for each user individually. If this option is selected, the user or users can change their password by going to **File > Change Password**.  
This feature is best disabled for cases where multiple people share the same user name for login.

**Change password every X Days** | If you want the user to change his or her password on a periodic basis, enter the number of days between password changes; otherwise, enter “0”.  
For example, enter “30” to require the user to change the password every month or “365” to require the user to change the password every year. At the end of each period, Horizon requires the user to change the password when he or she logs in.
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| E-mail Address        | Enter the user’s e-mail address.  
This field is planned for use with future enhancements to allow e-mail messages to be sent to the user. Even though the system does not use this field now, you may still want to enter the user’s e-mail address so it is available for future use.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| User Disabled         | Mark this box to prevent the user from accessing Horizon. Clear this box to restore access.  
This option lets you temporarily deny a user access to Horizon without having to delete the user definition or change the user’s password. If you mark this box and the user tries to log in, Horizon displays a message notifying the user of the change in status and refers the user to the system administrator for details. When you are ready to give the user access again, you can clear this box.                                                                                                                                                                                                                                                                                                                                                           |
| User expires on       | Mark this box if you want Horizon to disable the user account on a certain day; then choose the day in the field that appears to the right of the box. Clear this box to restore access or to stop the aging process.  
Use this feature for users who should not have access after a certain date, but whose access you may restore later (for example, student employees who will leave at the end of spring semester for summer break). If the user attempts to log in on or after the date you enter, Horizon displays a message that notifies the user of the change in status and refers the user to the system administrator for details. When you are ready to restore access, you can clear this box.                                                                                                                                                                                                 |
| Save User Preferences | Mark this box if you want Horizon to save the user’s changes to Launcher and MARC Editor preferences. Clear this box if you do not want Horizon to save the user’s changes.  
If you clear this box, the user can change preferences for a session, but the changes will be lost after the user logs out. Also, clearing this box will not remove any previously saved preferences.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
### Security Level

Choose the security level you want for the user.

A user’s security level determines the groups to which the user can be assigned. You can choose from these levels, shown in order of most access to the least access:

- **Sys Admin.** Gives the user access to all role privileges and to all data immediately. You do not need to assign the user to any groups, and no other setup is required except to give the user access to privileges controlled by passkeys (by assigning a passkey in the Pass Key field, explained on page 5-25).

  - **WARNING**

Assign the Sys Admin security level to the system administrator only. It gives the user immediate and full access to all role privileges and to all data.

- **Local Admin.** Restricts the user to groups with a security level of Local Admin or lower.
- **Supervisor.** Restricts the user to groups with a security level of Supervisor or lower.
- **Staff.** Restricts the user to groups with a security level of Staff and Guest.
- **Guest.** Restricts the user to groups with a security level of Guest.

Lowering a user’s security level may restrict the user from groups to which the user is already assigned. If so, Horizon tells you that the change will cause the user to be removed from some groups. If you still want to make the change, click **Yes**; otherwise, click **No**. (Raising the security level does not affect existing role and group assignments.)

### Preference Group

Choose a preference group for the user.

The preference group defines the default set of Launcher and MARC Editor preferences for the user. These preferences define the look and feel of the Horizon Launcher and the MARC Editor. The user can make changes to the defaults for a session, or indefinitely if you mark Save User Preferences (explained above). If a user resets Launcher preferences, the preferences are reset to the preferences of the group you have assigned in this field. (The MARC Editor has no reset capability.) (For more information about preference groups, see “Setting Up Preferences for Users” on page 5-63.)
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Location</td>
<td>Choose a default location for the user, or choose <strong>None</strong> to require the user to choose a location before logging in.</td>
</tr>
<tr>
<td></td>
<td>Horizon logs the user into this location unless the user changes the location at login. The user can change this default for the current session, or indefinitely (by marking the Make Default box in the Login Options window). The user can also change locations at any point after logging in. (For information about changing the location at login, see “Logging In to Horizon” in the “Getting Started” chapter of the <em>Horizon Basics Guide</em>.)</td>
</tr>
<tr>
<td>View Set</td>
<td>Choose the view set you want for the user, if any.</td>
</tr>
<tr>
<td></td>
<td>A view set is a group of one or more alternate views that you can assign to a user or group of users. View sets let you display custom Horizon list and edit windows for specific users, based on the needs of those users. If you assign the user to a view set, the user will see the views in the view set in place of the standard views. (For more information about view sets and alternate views, see “Working with Alternate Views” on page 7-41.)</td>
</tr>
<tr>
<td>Pass Key</td>
<td>Choose the passkey you want for the user.</td>
</tr>
<tr>
<td></td>
<td>The passkey you assign defines the passkey privileges to which the user has access. Once you create a passkey and assign it to a user, the user has access to the privileges defined in the passkey. No additional setup is required.</td>
</tr>
<tr>
<td>Default Owner</td>
<td>Choose a default owner for the user. If your library is not using record ownership, choose <strong>Unowned</strong>.</td>
</tr>
<tr>
<td></td>
<td>This field determines the default owner that Horizon assigns to records created by the user. The user can change this default at login for the current session or indefinitely (by marking the Make Default box in the Login Options window). The user can also change this default for the current session with the Change Default Owner option on the File menu. Note that for certain records, this default may be overridden by another setting. (For example, for bib and authority records, the default owner on the bib or authority workform is used instead.) If you are updating an existing user, the list of owners in this field is limited to owners for which the user has rights, based on the role/owner pairs assigned to groups to which the user belongs. (For information about changing the default owner at login, see “Logging In to Horizon” in the “Getting Started” chapter of the <em>Horizon Basics Guide</em>. For information about owners and record ownership, see “Ownerships” on page 5-6 and “Planning Ownerships” on page 5-14.)</td>
</tr>
</tbody>
</table>

4  Save your changes.

5  Repeat steps 2 through 4 for each additional user you want to create.
Task 6: Set Up Roles

Using the list of roles you defined in task 1, follow the steps in this task to set up the roles in Horizon. You will assign the roles to groups later in task 7. This task consists of two parts: first, creating the role and adding privileges, and second, adding CRUDO settings to include cataloging rights, if necessary.

Task 6.1: Create Role and Add Privileges

1. Start the Role Manager process.
   The default location of this process is the Administration\Security Menu folder on the navigation bar.
   Horizon displays the Role Manager window.
2. Click New to display the Role window.
   Here is an example of a completed window:
3 Complete these fields in the window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Enter a name for the role.</td>
</tr>
<tr>
<td></td>
<td>Choose a name that describes the general responsibilities of the role (such as “Cataloging Basic”).</td>
</tr>
<tr>
<td>Security Level</td>
<td>Choose the security level you want for the role.</td>
</tr>
<tr>
<td></td>
<td>A role’s security level determines which privileges can be assigned to the role. You can choose from these levels, shown in order of most access to the least access:</td>
</tr>
<tr>
<td></td>
<td>• Local Admin. Privileges with a security level of Local Admin or lower are available to assign to the role.</td>
</tr>
<tr>
<td></td>
<td>• Supervisor. Privileges with a security level of Supervisor or lower are available to assign to the role.</td>
</tr>
<tr>
<td></td>
<td>• Staff. Privileges with a security level of Staff or Guest are available to assign to the role.</td>
</tr>
<tr>
<td></td>
<td>• Guest. Only privileges with a security level of Guest are available to assign to the role.</td>
</tr>
<tr>
<td></td>
<td>The Sys Admin security level is not available for a role since users with this security level are given full rights automatically.</td>
</tr>
<tr>
<td></td>
<td>Lowering a role’s security level may restrict privileges already assigned to the role. If so, Horizon tells you that the change will cause privileges to be removed. If you still want to make the change, click Yes; otherwise, click No.</td>
</tr>
<tr>
<td></td>
<td>Raising a role’s security level may restrict groups to which the role has already been assigned. If so, Horizon tells you that the change will cause the role to be removed from some groups. If you still want to make the change, click Yes; otherwise, click No.</td>
</tr>
<tr>
<td>Role Owned By</td>
<td>Choose an owner for the role.</td>
</tr>
<tr>
<td></td>
<td>Access to the role definition is restricted to users who have the Role Manager privilege for the owner you choose (based on the role/owner pairs assigned to groups). If your library is not using record ownership for roles, use the default Unowned owner. (For information about owners and record ownership, see “Ownerships” on page 5-6 and “Planning Ownerships” on page 5-14.)</td>
</tr>
</tbody>
</table>

4 Click Add to display the Add Privileges window.

This window shows the privileges you can assign to the role based on the role’s security level. Privileges that you have already assigned to the role, if any, are not shown.
Follow these steps to assign privileges to the role:

1. Highlight the privileges you want to add to the role.
   Highlight only privileges that you want to add under the same permission. (You can repeat these steps later to add a different set of privileges under the other permission.) Use the SHIFT and CTRL keys as necessary to highlight multiple items in the list. Press CTRL+A to highlight all the items in the list.

2. Under **Permission**, choose the permission you want for the privileges:
   - **Full.** Grants the privilege to users without any restrictions.
   - **Approval Required.** Requires users to get permission before they are given access to the privilege. If the user attempts to access the privilege, Horizon prompts the user for a user name and password. Another user with full rights to the privilege must then enter his or her password before access is given. Horizon displays this prompt each time the user attempts to access the privilege, even if permission was granted previously in the same session.

3. Click **Add**.
   Horizon adds the privileges to the role with the permission you specified.

4. Repeat these steps if you want to add a different set of privileges under the other permission.

6. Click **Close** to close the Add Privileges window.

7. If you want to add cataloging privileges to the role, skip to step 4 in “Task 6.2: Add CRUDO Settings to a Role” on page 5-28.

8. Save your changes.

9. Click **Close** to close the Role window.

10. Repeat steps 2 through 9 for each additional role you want to create.

**Task 6.2: Add CRUDO Settings to a Role**

For roles that require cataloging privileges, complete this task to add rights for creating, reading, updating, and deleting bibs, authorities, and workforms, and for changing the owner assigned to these records. You can apply CRUDO settings at the record, tag, and subfield levels. You first define rights for the entire record and then define exceptions for individual tags and subfields as needed.

The rights you define at the record level apply to all tags and subfields unless you define exceptions for specific tags and subfields. Many libraries will need to define rights at the record level only; however, some libraries, such as academic libraries or multi-branch libraries may use tag- and subfield-level exceptions to restrict rights to specific tags (such as authority-controlled tags or local tags).
In general, rights at the tag level are inherited from the rights at the record level, and rights at the subfield level are inherited from the rights at the tag level. This diagram shows how rights are inherited from one level to another:

- **Record Level**: Read (R), Create (C), Update (U), Delete (D), Owner (O)
- **Tag Level**: Read (R), Create (C), Update (U), Delete (D)
- **Subfield Level**: Read (R), Create (C), Update (U), Delete (D)

The Read right at the record level grants or restricts Read rights for all tags and subfields, unless you define exceptions for individual tags or subfields. The Update right at the record level grants or restricts Create, Update, and Delete rights for all tags and subfields, unless you define exceptions for individual tags and subfields.

The Read right at the tag level grants or restricts Read rights for all subfields, unless you define exceptions for individual subfields. The Update right at the tag level grants or restricts Create, Read, Update, and Delete rights for all subfields, unless you define exceptions for individual subfields.

The Create, Delete, and Owner rights at the record level apply to the record only. The Create and Delete rights at the tag level apply to the tag only.

Note that the Update right does not automatically set the Read right. There may be cases when you want to grant Update rights but not Read rights at the record or tag level. (For example, suppose you want to give users read and update rights to only a handful of tags. To do this, you can grant Update rights, but deny Read rights at the record level. You can then turn on Read rights for only those tags you want the user to update, instead of granting Read rights at the record level and defining many tag-level exceptions to turn off read rights for all of the tags you do not want the user to see.)

Note that you can display information for which users have read-only rights in a different color in the MARC Editor. (For instructions, see “Choosing Field Options” in the “Customizing MARC Editor” chapter of the Cataloging Guide.)

**To add CRUDO settings to a role**

1. Start the Role Manager process.
   - The default location of this process is the Administration\Security Menu folder on the navigation bar.
   - Horizon displays the Role Manager window.
2. Highlight the role to which you want to add CRUDO settings.
3. Click Edit.
4. Click the Cataloging tab.
5. In the **Record Type** drop-down list, choose the record type for which you want to define privileges:
   - For authority records and authority workforms, choose auth.
   - For bib records and bib workforms, choose bib.
Mark the rights you want to grant for records of the specified record type (You can define exceptions to these privileges for specific tags and subfields in the next steps):

- **Read.** Mark this box to allow users to view records of the specified type. Marking this box allows users to view all the tags and subfields within the record, unless you enter exceptions for specific tags or subfields. Clear this box to prevent users from viewing records of the specified type. Clearing this box prevents users from viewing any tags or subfields within the record, unless you enter exceptions for specific tags or subfields.

- **Create.** Mark this box to allow users to create records of the specified type. Clear this box to prevent users from creating records of the specified type.

- **Update.** Mark this box to allow users to make changes to records of the specified type. Marking this box allows users to add, update, or delete any of the tags or subfields within the record, unless you enter exceptions for specific tags or subfields. Clearing this box prevents users from making changes to records of the specified record type. Clearing this box prevents users from adding, updating, or deleting any of the tags or subfields within the record, unless you enter exceptions for specific tags or subfields.

- **Delete.** Mark this box to allow users to delete records of the specified type. Clear this box to prevent users from deleting records of the specified record type.

- **Ownership Change.** Mark this box to allow users to change the owner assigned to records of the specified type. Clear this box to prevent users from changing the owner assigned to records of the specified type.

---

**IMPORTANT**

Mark each right you want to grant. Marking one right does not automatically grant another, related right. (For example, marking Update does not grant read rights. To allow the user to update the record, you must grant both Read and Update rights.)
If you want to define an exception for a tag, do these steps:

1. Click inside the **Tag** field.
2. Choose the tag from the drop-down list.
3. Mark the rights you want to grant for the tag (You can define exceptions to these rights for specific subfields in the next step):

   - **Read.** Mark this box to allow users to view the tag. Marking this box allows users to view all subfields within the tag, unless you enter exceptions for specific subfields. Clear this box to prevent users from viewing the tag. Clearing this box prevents users from viewing any of the subfields in the tag, unless you enter exceptions for specific subfields. This setting overrides the record-level setting for the tag.

   - **Create.** Mark this box to allow users to add the tag. Clear this box to prevent users from adding the tag.

   - **Update.** Mark this box to allow users to make changes to the tag. Marking this box allows users to add, update, or delete any of the subfields within the tag, unless you enter exceptions for specific subfields. Clear this box to prevent users from making changes to the tag. Clearing this box prevents users from adding, updating, or deleting any of the subfields within the tag, unless you enter exceptions for specific subfields. This setting overrides the record-level setting for the tag.

   - **Delete.** Mark this box to allow users to delete the tag. Clear this box to prevent users from deleting the delete the tag.

4. Repeat these steps for each tag-level exception you want.
If you want to define an exception to a tag-level setting for a specific subfield, do these steps:

1. Highlight the tag you want to define an exception for.
2. Click inside the **Subfield** field and choose the subfield from the drop-down list:

   ![Subfield Exception Table]

3. Mark the rights you want to grant for the subfield:
   - **Read.** Mark this box to allow users to view the subfield. Clear this box to prevent users from viewing the subfield. This setting overrides the tag-level setting for the subfield.
   - **Create.** Mark this box to allow users to add the subfield. Clear this box to prevent users from adding the subfield.
   - **Update.** Mark this box to allow users to change the data in the subfield. Clear this box to prevent users from changing the data in the subfield. This setting overrides the tag-level setting for the subfield.
   - **Delete.** Mark this box to allow users to delete the subfield. Clear this box to prevent users from deleting the subfield.

9. Save your changes.

10. If you want to create another role, go back to step 2 in task 6.1 on page 5-26.

**Task 7: Set Up Groups**

Using the list of groups you defined in task 1, follow the steps in this task to set up the groups in Horizon.

**To set up groups**

1. Start the **Group Manager** process.
   - The default location of this process is the Administration\Security Menu folder on the navigation bar.
   - Horizon displays the Group Manager window.
2. Click **New** to display the Group window.
Here is an example of a completed window:
3 Complete these fields in the window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Name</td>
<td>Enter a name for the group. For example, you might enter “Acquisitions Staff” if you are creating a group for Acquisitions staff.</td>
</tr>
<tr>
<td>Security Level</td>
<td>Choose the security level you want for the group. A group’s security level determines which users and roles can be assigned to the group.</td>
</tr>
<tr>
<td></td>
<td>You can choose from these levels, shown in order of most access to the least access:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Local Admin.</strong> Only users with a security level of Local Admin can be assigned to the group. (Users with a security level of Sys Admin could also be added to the group, but this is not necessary since these users are given rights to all role privileges and all data automatically.) Roles with a security level of Local Admin or lower can be assigned to the group.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Supervisor.</strong> Users with a security level of Supervisor or higher can be assigned to the group. Roles with a security level of Supervisor or lower can be assigned to the group.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Staff.</strong> Users with a security level of Staff or higher can be assigned to the group. Roles with a security level of Staff or Guest can be assigned to the group.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Guest.</strong> Users with a security level of Guest or higher can be assigned to the group. Only roles with a security level of Guest can be assigned to the group.</td>
</tr>
<tr>
<td></td>
<td>The Sys Admin security level is not available for a group since users with this security level are given rights to all role privileges and all data automatically.</td>
</tr>
<tr>
<td></td>
<td>Lowering a group’s security level may restrict roles already assigned to the group. If so, Horizon tells you that the change will cause roles to be removed. If you still want to make the change, click Yes; otherwise, click No.</td>
</tr>
<tr>
<td>Group Owned</td>
<td>Choose an owner for the group. Access to the group definition is restricted to users who have the Group Manager privilege for the owner you choose (based on the role/owner pairs assigned to groups). If your library is not using record ownership for groups, use the default Unowned owner.</td>
</tr>
</tbody>
</table>
|                   | (For information about owners and record ownership, see “Ownerships” on page 5-6 and “Planning Ownerships” on page 5-14.)
4 Do these steps to add users to the group:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Add</strong> to display the Add Users window. Only users with a security level that is the same as or higher than the security level assigned to the group are shown in the list.</td>
</tr>
<tr>
<td>2</td>
<td>Highlight the users you want to add to the group. Use the SHIFT and CTRL keys as necessary to highlight multiple items in the list. Press CTRL+A to highlight all the items in the list.</td>
</tr>
<tr>
<td>3</td>
<td>Click <strong>Add</strong>.</td>
</tr>
<tr>
<td>4</td>
<td>Click <strong>Close</strong> to close the Add Users window.</td>
</tr>
</tbody>
</table>

5 Do these steps to add roles to the group:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the <strong>Roles</strong> tab.</td>
</tr>
<tr>
<td>2</td>
<td>Click <strong>Add</strong> to display the Add Roles window. Only roles with a security level that is the same as or lower than the security level assigned to the group are shown in the list.</td>
</tr>
<tr>
<td>3</td>
<td>In the <strong>For Owner</strong> drop-down list, choose an ownership for the roles you are adding. Rights defined by the roles are restricted to records that are owned by the owner you choose. If you are not using record ownership, use the default <strong>Unowned</strong> owner.</td>
</tr>
<tr>
<td>4</td>
<td>Highlight the roles you want to add to the group. Highlight only those roles that you want to add for the owner you chose in the previous step. You can repeat these steps to add roles for other owners. Use the SHIFT and CTRL keys as necessary to highlight multiple items in the list. Press CTRL+A to highlight all the items in the list.</td>
</tr>
<tr>
<td>5</td>
<td>Click <strong>Add</strong>.</td>
</tr>
<tr>
<td>6</td>
<td>Repeat steps 3 through 5 in this table for any additional role/owner pairs you want to add.</td>
</tr>
<tr>
<td>7</td>
<td>Click <strong>Close</strong> to close the Add Roles window.</td>
</tr>
</tbody>
</table>

6 Save your changes.

7 Repeat steps 2 through 6 for each additional group you want to create.
## Updating Security

After you set up your security settings, you may need to make changes from time to time as your library staff changes, as responsibilities change, or when you upgrade to a new version of Horizon.

**NOTE**

If you are new to Horizon security, read “About Security” on page 5-3 before you begin making changes.

This section provides a quick reference for all the security-related tasks you can perform. Brief instructions are included for creating, changing, and deleting security elements. Cross-references are provided to more detailed information.

If you are creating new elements, you may want to refer to the tasks in the previous section, “Setting Up Security” on page 5-12, for more detailed instructions and for a list of field descriptions.

This section explains these topics:

- Updating Users
- Updating Passkeys
- Updating Roles
- Updating Ownerships
- Updating Groups

### Updating Users

<table>
<thead>
<tr>
<th>Task</th>
<th>Quick Steps</th>
<th>For more information, see</th>
</tr>
</thead>
</table>
| Add a user    | From scratch:  
1 Start the User Manager process.  
2 Click New.  
3 Complete the fields in the window.  
4 Click the Groups tab and add the user to one or more groups as needed.  
5 Save your changes.  
By copying an existing user:  
1 Start the User Manager process.  
2 Highlight the user you want to copy.  
3 Click Copy.  
4 Enter a login name in the User field.  
5 Enter the user’s name in the User Name field.  
6 Enter a new password or mark Password change required at next logon.  
7 Change any other information as needed.  
8 Click the Groups tab to add the user to one or more groups as needed.  
9 Save your changes.  | “Task 5: Set Up User Definitions” on page 5-21 |
## Updating Users

<table>
<thead>
<tr>
<th>Task</th>
<th>Quick Steps</th>
<th>For more information, see</th>
</tr>
</thead>
</table>
| Delete a user                 | 1. Start the **User Manager** process.  
2. Highlight the user you want to delete.  
3. Click **Delete**.  
4. Click **Yes** to delete the user definition. |                                                                 |
| Disable a user                | 1. Start the **User Manager** process.  
2. Highlight the user you want to disable.  
3. Click **Edit**.  
4. Mark **User Disabled**.  
5. Save your changes. | The “User Disabled” field on page 5-23 |
| Disable a user on a specific date | 1. Start the **User Manager** process.  
2. Highlight the user you want to disable.  
3. Click **Edit**.  
4. Mark **User expires on** and enter a date.  
5. Save your changes. | The “User expires on” field on page 5-23 |
| Expire a user’s password     | 1. Start the **User Manager** process.  
2. Highlight the user whose password you want to expire.  
3. Click **Edit**.  
4. Mark **Password change required at next logon**.  
5. Save your changes. | The “User expires on” field on page 5-23 |
| Change a user’s password     | 1. Start the **User Manager** process.  
2. Highlight the user whose password you want to change.  
3. Click **Edit**.  
4. In the **User Password** field, type the new password over the existing one.  
5. Press **TAB**.  
   Horizon prompts you to re-enter the password to confirm that you entered it correctly.  
6. Re-enter the password and click **OK**.  
7. Save your changes. | The “User Password” field on page 5-22 |
| Make batch changes to users  | 1. Start the **User Manager** process.  
2. Highlight the users you want to change.  
3. Click **Batch**.  
4. Update the fields as necessary.  
5. Click **OK**. | The “Password change required at next logon” field on page 5-22 |
### Updating Passkeys

<table>
<thead>
<tr>
<th>Task</th>
<th>Quick Steps</th>
<th>For more information, see</th>
</tr>
</thead>
</table>
| Add a passkey             | From scratch:  
1. Start the Pass Key Manager process.  
2. Click New.  
3. Enter a name and description for the passkey.  
4. Add views, stand-alone processes, and program features as needed.  
5. Save your changes.  
By copying an existing passkey:  
1. Start the Pass Key Manager process.  
2. Highlight the passkey you want to copy.  
3. Click Copy.  
4. Enter a name in the Pass Key field.  
5. Change the description in the Description field.  
6. Add or delete views, stand-alone processes, and program features as needed.  
7. Save your changes. | “Task 2: Set Up Passkeys” on page 5-15 |
| Delete a passkey          | 1. Start the Pass Key Manager process.  
2. Highlight the passkey you want to delete.  
3. Click Delete.  
4. Click Yes to delete the passkey. | |
| Add a privilege to a passkey | 1. Start the Pass Key Manager process.  
2. Highlight the passkey to which you want to add a privilege.  
3. Click Edit.  
4. Click the tab that corresponds to the type of privilege you want to add.  
5. If you are adding a program feature, choose the appropriate category from the Category drop-down list.  
6. Click Add.  
7. Highlight the privileges you want to add.  
8. Click Add.  
### Updating Passkeys

<table>
<thead>
<tr>
<th>Task</th>
<th>Quick Steps</th>
<th>For more information, see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove a privilege from a passkey</td>
<td>1. Start the <strong>Pass Key Manager</strong> process.&lt;br&gt;2. Highlight the passkey from which you want to remove a privilege.&lt;br&gt;3. Click <strong>Edit</strong>.&lt;br&gt;4. Click the tab that corresponds to the type of privilege you want to remove.&lt;br&gt;5. If you are removing a program feature, choose the appropriate category from the <strong>Category</strong> drop-down list.&lt;br&gt;6. Highlight the privileges you want to remove.&lt;br&gt;7. Click <strong>Remove</strong>.&lt;br&gt;8. Click <strong>Yes</strong> to remove the privileges.&lt;br&gt;9. Save your changes.</td>
<td>“Task 2: Set Up Passkeys” on page 5-15</td>
</tr>
<tr>
<td>Assign a passkey to a user</td>
<td>1. Start the <strong>User Manager</strong> process.&lt;br&gt;2. Highlight the user to whom you want to assign a passkey.&lt;br&gt;3. Click <strong>Edit</strong>.&lt;br&gt;4. In the <strong>Pass Key</strong> drop-down list, choose the passkey you want.&lt;br&gt;5. Save your changes.</td>
<td>The “Pass Key” field on page 5-25</td>
</tr>
</tbody>
</table>
# Updating Roles

<table>
<thead>
<tr>
<th>Task</th>
<th>Quick Steps</th>
<th>For more information, see</th>
</tr>
</thead>
</table>
| Add a role                    | From scratch:  
1. Start the Role Manager process.  
2. Click New.  
3. Enter a name, security level, and owner for the role.  
4. Use the Add button to add privileges to the role as needed.  
5. Click the Cataloging tab to add CRUDO setting for bibliographic records as needed.  
6. Save your changes.  
By copying an existing role:  
1. Start the Role Manager process.  
2. Highlight the role you want to copy.  
3. Click Copy.  
4. Change the name in the Role Name field.  
5. Change the security level and owner, if needed.  
6. Use the Add and Remove buttons to add or remove privileges as needed.  
7. Use the Modify button to change the permission for a privilege if needed.  
8. Click the Cataloging tab and change the CRUDO settings if needed.  
| Delete a role                 | 1. Start the Role Manager process.  
2. Highlight the role you want to delete.  
3. Click Delete.  
4. Click Yes to delete the role.                                                                                     |
| Add a privilege to a role     | 1. Start the Role Manager process.  
2. Highlight the role to which you want to add a privilege.  
3. Click Edit.  
4. Click Add.  
5. Highlight the privileges you want to add.  
6. Under Permission, choose the permission you want for the privileges.  
7. Click Add.  
8. Click Close.  
9. Click Save.  
10. Click Close.                                                                                                     | “Task 6.1: Create Role and Add Privileges” on page 5-26 |
## Updating Roles

<table>
<thead>
<tr>
<th>Task</th>
<th>Quick Steps</th>
<th>For more information, see</th>
</tr>
</thead>
</table>
| Remove a privilege from a role      | 1 Start the **Role Manager** process.  
2 Highlight the role from which you want to remove a privilege.  
3 Click **Edit**.  
4 Highlight the privileges you want to remove.  
5 Click **Remove**.  
6 Click **Yes** to remove the privileges.  
7 Save your changes.                                                                 | “Task 6.1: Create Role and Add Privileges” on page 5-26                                    |
| Add or change CRUDO settings for a role | 1 Start the **Role Manager** process.  
2 Highlight the role whose CRUDO settings you want to change.  
3 Click **Edit**.  
4 Click the **Cataloging** tab.  
5 In the **Record Type** drop-down list, choose the record type you want.  
6 Change the CRUDO settings as necessary.  
7 Save your changes.                                                                 | “Task 6.2: Add CRUDO Settings to a Role” on page 5-28                                     |
| Change the permission for a role privilege | 1 Start the **Role Manager** process.  
2 Highlight the role that contains the privilege whose permission you want to change.  
3 Highlight the privilege whose permission you want to change.  
4 Click **Modify**.  
5 Choose the permission you want.  
6 Click **OK**.  
7 Save your changes.                                                                 | “Task 6.1: Create Role and Add Privileges” on page 5-26                                    |
### Updating Ownerships

<table>
<thead>
<tr>
<th>Task</th>
<th>Quick Steps</th>
<th>For more information, see</th>
</tr>
</thead>
</table>
| Set up an owner               | 1 Start the **Ownership Manager** process.  
2 Click **New**.  
3 Enter a name for the owner in the **Descri** field.  
4 Save your changes. | “Task 3: Set Up Record Ownership” on page 5-18 |
| Delete an owner               | If the owner is assigned to any records, those records will no longer have an owner after you delete the owner, and no users will be able to access the records until a new owner is assigned.  
1 Activate the **Ownership Manager** process.  
2 Highlight the owner you want to delete.  
3 From the **File** menu, choose **Delete Record**.  
4 Click **OK** to delete the record. |                                                      |
| Assign an owner to a record   | 1 Create a new record, or access an existing record.  
2 In the **Owned By** field, choose an owner for the record.  
The name of this field may vary from record type to record type (for example, “User Owned By” on user records, and “Role Owned By” on role records).  
3 Save the record. | “Task 3.2: Assign Owners to Records” on page 5-19 |
| Change the default owner for a user | 1 Start the **User Manager** process.  
2 Highlight the user whose default owner you want to change.  
3 Click **Edit**.  
4 In the **Default Owner** drop-down list, choose the default owner you want for the user.  
5 Save your changes. | The “Default Owner” field on page 5-25 |
To change the owner associated with a role, you must remove the role/owner pair, then add the role again for the new owner.

1. Start the **Group Manager** process.
2. Highlight the group with the role/owner pair you want to change.
3. Click **Edit**.
4. Click the **Roles** tab.
5. Highlight the role/owner pair you want to remove.
6. Click **Remove**.
7. Click **Yes** to remove the role/owner pair.
8. Click **Add**.
9. In the **For Owner** drop-down list, choose the owner you want to associate with the role.
10. Highlight the role.
11. Click **Add**.
12. Click **Close**.
13. Save your changes.

"Task 7: Set Up Groups" on page 5-32
### Updating Groups

<table>
<thead>
<tr>
<th>Task</th>
<th>Quick Steps</th>
<th>For more information, see</th>
</tr>
</thead>
</table>
| Add a group           | **From scratch:**  
1. Start the Group Manager process.  
2. Click New.  
3. Enter a name, security level, and owner for the group.  
4. Use the Add button to add users to the role as needed.  
5. Click the Roles tab.  
6. Use the Add button to add roles to the group as needed.  
7. Save your changes.  
**By copying an existing group:**  
1. Start the Group Manager process.  
2. Highlight the group you want to copy.  
3. Click Copy.  
4. Change the name in the Group Name field.  
5. Change the security level and owner, if needed.  
6. Use the Add and Remove buttons to add or remove users as needed.  
7. Click the Roles tab.  
8. Use the Add and Remove buttons to add or remove roles as needed.  
9. Save your changes. | “Task 7: Set Up Groups” on page 5-32 |
| Delete a group        | 1. Start the Group Manager process.  
2. Highlight the group you want to delete.  
3. Click Delete.  
4. Click Yes to delete the group. |                                                   |
| Add a user to a group | 1. Start the Group Manager process.  
2. Highlight the group to which you want to add a user.  
3. Click Edit.  
4. Click Add.  
5. Highlight the user you want to add.  
6. Click Add.  
7. Click Close.  
8. Save your changes. | “Task 7: Set Up Groups” on page 5-32 |
## Updating Groups

<table>
<thead>
<tr>
<th>Task</th>
<th>Quick Steps</th>
<th>For more information, see</th>
</tr>
</thead>
</table>
| Add a role to a group    | 1 Start the **Group Manager** process.  
2 Highlight the group to which you want to add a role.  
3 Click **Edit**.  
4 Click the **Roles** tab.  
5 Click **Add**.  
6 In the **For Owner** drop-down list, choose the owner you want to associate with the role.  
7 Highlight the role you want to add.  
8 Click **Add**.  
9 Click **Close**.  
10 Save your changes.                                                                 | “Task 7: Set Up Groups” on page 5-32                            |
| Remove a user from a group| 1 Start the **Group Manager** process.  
2 Highlight the group from which you want to remove a user.  
3 Click **Edit**.  
4 Highlight the user you want to remove.  
5 Click **Remove**.  
6 Click **Yes** to remove the user.  
7 Save your changes.                                                                 | “Task 7: Set Up Groups” on page 5-32                            |
| Remove a role from a group| 1 Start the **Group Manager** process.  
2 Highlight the group from which you want to remove a role.  
3 Click **Edit**.  
4 Click the **Roles** tab.  
5 Highlight the role you want to remove.  
6 Click **Remove**.  
7 Click **Yes** to remove the role.  
8 Save your changes.                                                                 | “Task 7: Set Up Groups” on page 5-32                            |
Security Details

This section provides additional information about Horizon security. Specifically, it covers these topics:

- Securing a Local Process
- Securing Views within the Table Editor
- Troubleshooting
- Secured Processes

Securing a Local Process

If necessary, you can secure a local process. A local process is any process that you add to the navigation bar. (You might add processes to the navigation bar to give users access to programs or views that are not included by default. For more information about local processes, see “Adding a Process to the Navigation Bar” on page 5-75.) You secure a local process by defining a local privilege and associating that privilege with the local process. Local privileges function just like role privileges. You assign local privileges to roles as needed to give users access to the corresponding processes.

This section explains these topics:

- Overview
- Creating a Local Privilege
- Associating a Local Privilege with a Process

Overview

Securing local processes consists of these tasks:

1. Add local processes. You add the local processes that you want to make available to users, if you have not already done so. (For instructions, see “Adding a Process to the Navigation Bar” on page 5-75.) Note that users can add their own processes (if they have the GEN Customize Launcher role privilege). However, these processes are not secured with privileges since they are available only to the user who added them.

2. Create local privileges. You create a local privilege for each local process you want to secure. (For instructions, see “Creating a Local Privilege” on page 5-47.)

3. Associate local privileges with processes. You associate the local privileges to the local processes. (For instructions, see “Associating a Local Privilege with a Process” on page 5-47.)

4. Assign local privileges to roles. You assign the local privileges to roles as necessary to give users access to the local processes. (For instructions, see “Add a privilege to a role” on page 5-40.) Users who have rights to the privilege and who belong the applicable preference group will have access to the process.
Creating a Local Privilege

1. Start the Local Privilege Manager process.
   The default location of this process is the Administration\Security Menu folder on the navigation bar.
   Horizon displays the List Local Privilege Manager window.

2. Click New to display the Edit Local Privilege Manager window.

3. Complete these fields in the window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Privilege Number</td>
<td>Displays the ID assigned to the privilege.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the privilege. The description identifies the privilege in Horizon. Enter a clear description that will help you remember what process it applies to. (For example, if you are adding a privilege to secure a process that launches Microsoft Word, you might enter “Launch Microsoft Word”.) If you want local privileges to appear together in privilege lists, include a prefix (for example, “LOC”).</td>
</tr>
<tr>
<td>Security Level</td>
<td>Choose the security level you want for the privilege. The security level you assign to a privilege determines the roles to which it can be assigned. You can choose from these levels:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Sys Admin.</strong> Restricts the privilege from all roles. Only users with a security level of Sys Admin can access the privilege.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Local Admin.</strong> Restricts the privilege to roles with a security level of Local Admin or higher.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Supervisor.</strong> Restricts the privilege to roles with a security level of Supervisor or higher.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Staff.</strong> Restricts the privilege to roles with a security level of Staff or higher.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Guest.</strong> Makes the privilege available for all roles.</td>
</tr>
</tbody>
</table>

Associating a Local Privilege with a Process

1. Start the Preference Group Manager process.
   The default location of this process is the Administration folder on the navigation bar.
   Horizon displays the Preference Group Manager window.

2. In the Preference Group drop-down list, choose the preference group that contains the local process you want to secure.

3. Under Customize, choose Launcher, if it is not already selected.

4. Click Modify.

5. Click the Navigation Bar tab.

6. On the left side of the tab, highlight the local process.
Securing Views within the Table Editor

If you give users access to the Table Editor, be aware that many of the views that are accessible within the Table Editor are not secured by default. (For example, the circ_Parameter view is not secured by default.) Consequently, you may want to review these views and secure those whose access you want to limit. You secure a view by marking the Secured check box in the view definition (as explained in the steps on page 5-48). Marking the Secured check box creates a passkey privilege for the view, which you can then assign to passkeys as needed.

Search views and program-only views are secured as part of the processes in which they appear; changing the Secured check box for these views will have no effect. General views, which are the views you access in the Table Editor, may or may not be secured. Although access to the Table Editor is controlled by the ADM Table Editor role privilege, once you grant this privilege to a user, he or she has access to all unsecured views within the Table Editor (as well as any secured views for which he or she has rights).

You can add general views to the navigation bar for a group of users in a preference group. (For instructions, see “Adding a View as a Process to the Navigation Bar” on page 5-73.) To access these views, users still need the ADM Table Editor role privilege and the passkey privilege for the view, if any. (Note that if you secure the view with a local privilege, the local privilege replaces the ADM Table Editor role privilege.) Views that are included on the navigation bar by default (system-defined processes) are secured by role privileges only. Users can access these views (either from the navigation bar or from within the Table Editor) only if you grant them the appropriate role privilege.

To secure views within the Table Editor

1. Follow these steps to generate a list of all the general views on your system that are not secured:

   1. Start the View Control process.
      The default location of this process is the Administration folder on the navigation bar.
      Horizon displays the List Horizon View window with a search window on top.
   2. In the Search window, click Cancel.
      Horizon asks you if you want to load all of the rows in the view.
   3. Click OK.
   5. In the Selection Criteria window, enter this text string:
      `privilege_number = null and view_type = 0`
      Horizon updates the list to include only general views that are not secured.
Review the views in the list, and complete these steps for each view you want to secure.

1. Highlight the view you want to secure.
2. Click Edit to display the Edit Horizon View window:

   ![Edit Horizon View window]

   3. Mark the Secured box.
   4. Save your changes.

   Horizon creates a passkey privilege for the view and displays the privilege number in the Privilege Number field. Now that the view is secured, users cannot access it until you grant them access. (Note that clearing the Secured box deletes the passkey privilege, removes the privilege number, and makes the view unsecured.)

3. When you are finished reviewing and updating the security setting for your views, close the List Horizon View window.

4. If you want to grant the newly created privileges to users, exit Horizon, log back in, and use the Pass Key Manager to add the privileges to passkeys as necessary.

(For instructions on adding a privilege to a passkey, see “Add a privilege to a passkey” on page 5-38.)
Troubleshooting

This section provides answers to problems you may encounter as you set up and change security settings.

- **Q**: Changes to a user’s security settings appear to have no effect.
  **A**: Have the user log off and log back in. Changes to a user’s security settings do not take effect until after the user exits Horizon and logs back in.

- **Q**: I created a new user, but the user does not show up when I try to add the user to a group.
  **A**: It is likely that the user’s security level is not high enough for the group. The user’s security level must be the same as or higher than the security level of the group.

- **Q**: A user is unable to open a view in the Table Editor. When the user tries to open the view, the Table Editor simply closes. No message is displayed.
  **A**: The view is secured with a role privilege and the user has not been granted that privilege.

Secured Processes

This section lists all the passkey and role privileges in Horizon. All startup processes launched from the navigation bar are controlled by role privileges. Most secured processes accessed from within a window (using a button or a menu option) are currently controlled by passkey privileges. However, a few of these processes use roles; more will use roles in future releases of Horizon. Stand-alone processes currently require both role and passkey privileges.

Some Horizon processes do not have a privilege. These processes are secured indirectly, which means that users can access them only through another process that is secured.

Passkey Privileges

Here is a list of all the roles you can assign to passkeys. There are three types of passkey privileges—views, stand-alone programs, and program features. Note that in the case of views, the privileges shown here are for views that are secured by default and may vary from the secured views on your system.

**Views**

- Alternate Horizon Views
- Bib Category Codes for Elements
- Bib Co-tag Definitions
- Binding Status Codes
- Booking Calendar
- Booking Schedule
- Borrower phone type
- Chronology Interpretation

**Views (continued)**

- Chronology Pattern Codes
- Chronology Pattern Parts
- Circ Slip Messages
- Circulation Slip/Receipt
- City, State Codes
- DB Codepage Call Non-sorting Delimiters
- Define Linking Tag
- Delete/New Auth’s - Author
- Delete/New Auth’s - Series
- Delete/New Auth’s - Subject
- Home Service Delivery Types
- Horizon Database Customizations
- Horizon Database Info (PAC)
- Horizon Server Info (PAC)
- Horizon Upgrade Logs
- Label Content Definition
- Label Contents Editing
- Lister View Definitions
- Location Addresses
- Locations whose blocks to display
- MARC field usage definition
- Media Collection
- Media Delivery Location
- Media Return Location
- Media Type Codes
- Menu Options
- mq_index processor codes
- Newkey Display-only
- Non-MARC Field Definition
- Non-MARC fields
- Non-MARC to MARC mappings
- Optional Borrower List
- Pac Flavor: Servers
- PAC Flavor: ZServers

Views (continued)
- pac restriction location
- Primary and Secondary locations linkage
Chapter 5: Security and Preferences

- Print formats for Circulation blocks
- Program Features
- Publication Patterns
- Restrictions for PAC by Flavor
- Run Codes
- Secured record security groups
- Serials Checkin Locations
- Service Classes
- Services
- Sort Weight Table
- Stat Category--Horizon only
- Stat Dayend Control-Horizon
- Stat Report Labels--Horizon only
- Summary Binding pull List
- Synchronize to Servers/Databases
- Table to assist with Sybase Security
- Table to Synchronize to remote DB
- Title Restriction (for PAC)
- View Sets
- Word Index Edit
- Word Index group limit edit
- X.12 Claim Response Codes
- X.12 Media Type Codes
- XLMop Menus
- Z39.50 Database Attr. Info.
- Z39.50 Databases
- Z39.50 Server Info

Stand-alone Programs
- Adhoc Stat Reports
- Circulation Reports
- Day End Processes
- Find Missing Inventory

Stand-alone Programs (continued)
- Percon Inventory
- Report Inventory Exceptions
• Self-serve Checkout
• Telxon Inventory
• Workstation Inventory

**Program Features**

*Acquisitions (acq)*

• Add or Edit a Purchase Order Line
• Add PO Line Item after PO Line Approval
• Attach/detach Copy Records to/from Purchase Order Line
• Back Order a Purchase Order Line
• Cancel a Purchase Order Line
• Change ONLY PO Line Notes after PO Line Approval
• Change PO Line after PO Line Approval
• Change Statement Header after Statement Approval
• Create Copy Records for Purchase Order Line
• Create Item Records for Purchase Order Line
• Delete a Purchase Order Line
• Delete a Purchase
• Delete Acquisitions Generated Bibliographic Data
• Exceed Budget Order Limit
• Exceed Budget Spent Limit
• Exceed Vendor Contract Order Limit
• Exceed Vendor Contract Spent Limit
• Open a Purchase Order
• PO Line Approval
• Print a Draft Purchase Order
• Print a Voucher
• Print Claims
• Process a Purchase Order
• Receive a Purchase Order Line
• Record Invoice Line on a Statement
• Specify a Borrower on a Purchase Order Line
• Specify a Budget Split on a Purchase Order Line

**Program Features, Acquisitions (continued)**

• Statement Approval
• Undo a Processed Purchase Order
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- Undo a Statement Line
- Undo PO Line Approval
- Undo Receipt or Cancel of Purchase Order Line
- Undo Renewal or Discontinue of Purchase Order Line
- Undo Statement Approval
- Use Closed Budgets
- Use Frozen Budgets
- Void a Voucher

*Acquisitions Manager (acqman)*

- Delete an Account
- Modify Budget Hierarchy

*Advanced Booking (booking)*

- Allow short bookings
- Delete booking

*Cataloging (cat)*

- Batch create items
- Copy item record
- Create a new item record
- Create copy records
- Create summary of holdings
- Delete copy record
- Delete item
- Edit copy record
- Edit item record
- Edit summary of holdings
- Relink copies
- Relink items

*Circulation (crc)*

- Add a block record to burb table
- Add a fee record to burb table
- Add Borrower Record
- Cancel hold

Program Features, Circulation (continued)

- Change a fee record on burb table
- Change circ date and time
• Change CircSlip ini settings
• Check out an item on hold for another borrower
• Check out but don’t renew expired borrower
• Check out ok from blocks window
• Checkout or renew an item requested by another borrower
• Circulation payment menu
• Circulation refund menu
• Circulation waiver menu
• Claimed or Lost CKO menu items
• Clear checkin note
• Create proxy borrower
• Damaged Checkin Mode
• Delete Block
• Delete Borrower Record
• Due date or due time is changed
• Edit Borrower Record
• Edit Item in circulation
• Exceed maximum number of items checked out
• Exempt from fines
• Fast-add bib and item
• Fast-add item to existing bib
• List items checked out to borrower
• Mark item as claim returned
• Mark item as lost
• Override button for noncirculating items
• Override button for non-overnightable bookable items
• Override button in renewal dialog box
• OverRide button on Max dialog
• Renew button from borrower expired dialog
• Renew from the CKO menu
• Select BookDrop in CKI
• Select StatsOnly in CKI
• Show Borrower Record from CKI

Table Editor (mrt)

• Archive Data
• Clear Archived Data
Chapter 5: Security and Preferences

- Create/Retrieve/Delete Groups
- Restore Data

**Staff Searching (pui)**

Allow viewing secured bibs (911 tag)

**Reserve Bookroom (rbr)**

- Access item archives
- Access items list from ICT
- Copy borrower record
- Copy course record
- Copy instructor record
- Create new ICT record
- Create new item
- Create short bib
- Delete course record
- Delete instructor record
- Edit ICT record
- Edit item
- Flag item for reserve
- Flag items for withdrawal
- Link course to instructor
- Link instructor to course
- Print spine label
- Unarchive an item

**Requests (request)**

- Delete Requests from Pull List
- Delete Request in CIRC or Staff Pac
- Edit request
- Reorder request queue

**Serials (ser)**

- Access routing functions
- Add copy issues
- Attach a PO Line Item

Program Features, Serials (continued)

- Checkin issue
- Copy copy record
- Create new copy
- Create new issue
- Create new prediction
- Create new route
- Create new summary of holdings
- Create pre-checkin note
- Create special issue
- Delete copy record
- Delete issue
- Delete prediction
- Detach a PO Line Item
- Edit copy from serials
- Edit issue
- Edit prediction
- Edit route
- Edit summary of holdings
- Force claim
- Predict Like ...
- Predict next issue
- Select next vendor
- Send record to scki
- SER Purge Copy
- Serials Binding Bundles
- Serials Binding Checkout Lot
- Serials Binding Copy Record Setup
- Serials Binding Lot Workform Printing
- Serials Binding Lots
- Serials Binding Print Bundle Workforms
- Serials Binding Pull Lists
- Set copy status to damaged
- Set copy status to not coming
- Set expected

Program Features, Serials (continued)
- View attached PO Line Items
- View copy history
View issue detail

**Role Privileges**

Here is a list of all the privileges you can assign to passkeys:

*Acquisitions*

- ACQ Acquisitions Parameters
- ACQ Batch Print Workslips
- ACQ Budget (Find, Fiscal Year Allocation)
- ACQ Budget (New, Edit, Batch Create Fiscal Year Allocation)
- ACQ Budget Batch Reassign
- ACQ Budget Batch Transfer Unspent Amounts
- ACQ Budget Hierarchy Management
- ACQ Budget Hierarchy Report
- ACQ Budget Summary Report
- ACQ Budget Titles by Budget Report
- ACQ Claims Review
- ACQ Currency Table Edit
- ACQ Extra Charge Type Table Edit
- ACQ General (Upload EDIFACT Files, Batch Approve, Batch Renew)
- ACQ Import Acquisitions Map
- ACQ Invoice (New, Edit, & Process Statement)
- ACQ Invoice Find Statement
- ACQ PO (Find by Header, by Line)
- ACQ PO (New, Edit)
- ACQ PO Activity Type Table Edit
- ACQ PO Line Statistical Class Table
- ACQ PO Renew
- ACQ PO Set Renewal Orders
- ACQ PO Subscription Period for PO Renewals
- ACQ PR (New, Edit)
- ACQ PR Category Table Edit
- ACQ PR Find
- ACQ Selection Table Edit

Role Privileges, Acquisitions (*continued*)

- ACQ Vendor Table Edit
- ACQ Vendor Titles by Vendor & Vendor Contract Reports
• ACQ Voucher Find
• ACQ Workstation Workslip Options

Administration
• ADM Adhoc Statistical Reports
• ADM Bib Match Point Table
• ADM Borrower Circ Types
• ADM Borrower Stat Classes
• ADM Browse Link Setup
• ADM Call # Item Stat Classes
• ADM Call # Types
• ADM Collection Codes
• ADM CSA Location
• ADM CSA Printer
• ADM Data Load Error Log
• ADM Day End Activity Log
• ADM Day End Processes
• ADM E-mail Parameters
• ADM Indexes
• ADM Item Circ Types
• ADM Item Group Editor
• ADM Item Group Editor - Status Only
• ADM Item Statistical Classes
• ADM Leading Article Table
• ADM Location Parameters
• ADM MARC Map Table
• ADM Matham - System-wide Parameters
• ADM Merge Profiles
• ADM New Key Table
• ADM Preference Group Manager
• ADM Statistics Category Control Table
• ADM Statistics Day End Control
• ADM Statistics Report Heading Table

Role Privileges, Administration (continued)
• ADM Stop Word Table
• ADM Syntax and Validation
• ADM Table Editor
• ADM View Control, PAC Lister Views

Cataloging
• CAT Authority Auth # Lookup
• CAT Authority Batch Auth Export, Auth Export
• CAT Authority Batch Auth Print
• CAT Authority Clear New Auth Table
• CAT Authority Edit Status Record
• CAT Authority Global Change
• CAT Authority Link Authority Records
• CAT Authority Merge Records
• CAT Authority New
• CAT Bibliographic Batch Bib Export, Bib Export
• CAT Bibliographic Batch Bib Print
• CAT Bibliographic Bib Quick Search
• CAT Bibliographic Convert to Non-MARC
• CAT Bibliographic Copy Bib Record
• CAT Bibliographic Create New Bib
• CAT Bibliographic Edit Status Record
• CAT Bibliographic Link Always on Authority Controlled Tag
• CAT Bibliographic Link Bib Records
• CAT Bibliographic Link Never on Authority Controlled Tag
• CAT Bibliographic Link on Match Authority Controlled Tag
• CAT Bibliographic Link to Authority
• CAT Bibliographic Merge Records
• CAT Bibliographic Unlink Authority
• CAT Enter Special Characters
• CAT General (Item Barcode Lookup, Item/Copy List, Batch Print, Print Spine Labels)
• CAT Import MARC Record Import
• CAT Label Dimensions/Context
• CAT Label Set Definitions
Role Privileges, Cataloging (continued)

- CAT MARC Editor
- CAT Non-MARC Add Field
- CAT Non-MARC Convert to MARC
- CAT Non-MARC Delete Field
- CAT Workforms

Circulation

- CRC Block (Note) Code Types
- CRC Circ Privileges Table
- CRC Circulation Reports
- CRC Closed Stack Requests
- CRC General (Open Checkin, Checkout Windows)
- CRC Item Status Codes
- CRC Recall Item
- CRC Self-Serve Checkout
- CRC Setup Usage Statistics Periods
- CRC View Usage Statistics

General

- GEN Change Location
- GEN Customize Launcher

Home Service

- HS Display Home Service Borrower Log
- HS Display Home Service Visits Due
- HS Home Service Borrowers Routes
- HS Update Home Service Borrower
- HS Update Home Service Delivery Sequence
- HS Update Home Service Readers Advisors
- HS Update Home Service Routes

Inventory

- INV Find Missing Inventory
- INV Percon Inventory
- INV Report Inventory Exceptions
- INV Report Missing Inventory
- INV Statistics Report
- INV Telxon Inventory
- INV Workstation Inventory
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Offline Circulation
- PCR Off-Line Circ Download Parameter Table
- PCR Off-Line Circ Exception Report
- PCR Off-Line Circ Point Table
- PCR Off-Line Circ Stat Report
- PCR Off-Line Circ Upload Utility

Staff Searching
- PUI Borrower Booking List
- PUI Borrower Request List
- PUI General (New Search, Z39.50 Search, Views)
- PUI PAC Flavor Table
- PUI Search Option Table

Reserve Bookroom
- RBR Access Titles
- RBR Course Edit
- RBR Course New
- RBR General
- RBR Instructor Edit
- RBR Instructor Letter Withdrawal
- RBR Instructor New
- RBR Items Reserve
- RBR Items Withdraw
- RBR Location Switch
- RBR Pick List Cumulative Report
- RBR Pick List Prepare and Show
- RBR Pick List Show
- RBR Pull List Withdrawal
- RBR Set Defaults

Security
- SEC Group Manager
- SEC Local Privilege Manager
- SEC Ownership Manager
- SEC Pass Key Manager
- SEC Privilege Manager
- SEC Role Manager
- SEC User Manager
Serials

- SER Binding Claims Review
- SER Binding Forms
- SER Binding Print Binding Claims
- SER Binding Print Binding Recovery
- SER Claims Import X.12 Responses
- SER Claims Printing
- SER Claims Review
- SER Claims Review X.12 Responses
- SER Coded Binding Color
- SER Coded Binding Foil Color
- SER Coded Binding Fonts
- SER Coded Binding Material
- SER Coded Binding Methods
- SER Coded Binding Triggers
- SER General (Serials Checkin, Print Recovery, Set SCKI Date, Binding)
- SER Serials Control Quick Search
- SER Set X.12 File Directories
- SER Update Binders

Setting Up Preferences for Users

You can control the appearance, functionality, and workflow for a specific user or a group of users. You do this by setting up preference groups, and assigning specific preferences and users to each preference group. (Preference groups are different from the groups you set up in Horizon security.)

You can set up these types of preferences:

- **Launcher.** You can add buttons to the toolbar, hide processes in the navigation bar, decide which processes launch automatically at startup, set up diacritic shortcut keys, and so forth. (For more information, see the Launcher Configuration Guide.)
- **MARC Editor.** You can set up error checking, choose font size and text colors, determine spacing between columns, set up shortcuts, choose delimiters, and so forth. (For more information, see the “Customizing the MARC Editor” chapter of the Cataloging Guide.)

You can create, change, and delete preference groups. A preference group can apply to an entire site, to a select group of staff members, or be changed by each user. If you allow a user to change their own preferences, those changes will override all other preferences.

As part of Launcher preferences, you can set up some additional options on the navigation bar that your users generally do not set up themselves. (For example, you can add a specific Table Editor view as a process on the navigation bar and add switches to specify additional functionality.)
This section explains these topics:

- About Preference Groups
- Adding a Preference Group
- Assigning a Preference Group to Users
- Changing a Preference Group
- Deleting a Preference Group
- Changing Administration-Level Settings on the Navigation Bar
- Switches

---

### About Preference Groups

The preferences in Preference Groups work together in levels. Horizon has three preference group levels:

- **Dynix.** This group is the highest level. Horizon uses this level “behind-the-scenes” as the initial preferences for all lower levels and as a base for future upgrades from SirsiDynix. You cannot change or even view the preferences at this level.

- **Site.** This is the highest preference group level where your library can make changes. The Site Preferences group lets you assign preferences that can affect all users at your site. At installation, it is assigned as the default preference group for all Horizon users. Horizon uses the preferences in this group after it has checked for preferences in groups below this level.

- **Local.** If you want to use specific settings for some of your users, you can create new preference groups at the local level. These groups can be specific to a smaller group of users within the library itself, such as Circulation. Horizon uses the preferences in the group at this level after it has checked for preferences in groups below this level.

You can use preferences in the groups on the higher levels to complement specific choices in the groups on lower levels.

Each user is assigned to the Site Preferences group at the Site level. You cannot delete this group. However, you can make changes in this group. If you do not change these preferences at a local level, they will apply to all users.

You can let users make changes to their own environment and workflow. Preference changes on a user level override all other group preferences. If you let a user modify the local group preferences, then whenever that user logs into Horizon their personalized preferences are used. You cannot change or modify those individual changes at the local or site level.

No matter which way you decide to set up your preference groups, remember that Horizon uses the preferences in this order: users, local, site, and Dynix. Horizon will only use settings in a higher level if there are no preferences specified at a lower level.
Adding a Preference Group

You may need to add a local preference group that includes special preferences for a certain group. (For example, your acquisitions staff may need access to a local budget program that other staff members do not need to use.)

**IMPORTANT**

If you change preferences in a group that is above the user level, a user's individual preferences might override any changes you make to local groups or to the site group. To prevent this, you must make sure each user is assigned to the group you have changed and that they cannot modify their individual preferences. (For more information, see “Assigning a Preference Group to Users” on page 5-66.)

To add a preference group

1. Start the Preference Group Manager process.
   The default location of this process is the Administration folder on the navigation bar.
   Horizon opens the Preference Group Manager window:

   ![Preference Group Manager Window](image)

2. Click New.
   Horizon displays the Preference Group Name dialog box:

   ![Preference Group Name Dialog Box](image)

3. Enter a name for this new preference group.
   (For example, enter “Circulation”.)

4. Click OK.

5. Do one of these options at the Customize menu:
   - To set up Launcher preferences in this group, choose Launcher.
   - To set up MARC Editor preferences, choose MARC Editor.

6. Click Modify.
Horizon displays the customize window for the type of preferences you chose.

7 Set up the preferences.

<table>
<thead>
<tr>
<th>To set up these preferences</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Launcher preferences</td>
<td>The Launcher Configuration Guide</td>
</tr>
<tr>
<td></td>
<td>(For instructions on adding a view or a process, or assigning switches to processes, see “Changing Administration-Level Settings on the Navigation Bar” on page 5-72.)</td>
</tr>
<tr>
<td>MARC Editor preferences</td>
<td>The “Customizing the MARC Editor” chapter in the Cataloging Guide</td>
</tr>
</tbody>
</table>

NOTE
You do not have to change all the preferences in this group. Change only those preferences that you want to be different for this group of users. Any preferences that are not specified at this level are inherited from the site preferences. (For example, if you want the logo you specified in the Site Preferences group to apply to these users, do not specify another logo here.)

8 When you have finished setting up preferences, click OK to save your changes.

9 To set up another type of preferences for this group, repeat steps 5 through 8.

10 Assign this preference group to users.
   (For instructions, see “Assigning a Preference Group to Users” on page 5-66.)

Assigning a Preference Group to Users

You can assign a preference group to an individual user or a group of users. Each Horizon user can be assigned to only one preference group; however, all users inherit preferences from the Site Preference Group, unless those preferences are overridden. Therefore, no matter which local group a user is assigned to, all preferences that are not specified in the local group are taken from the higher levels. (For example, if you want all users to see the same logo for the library, you can apply this preference setting to the Site Preferences group. Horizon uses this setting as long as it does not find another logo setting at a lower level.)

This section explains these topics:

- Assigning a Preference Group to a Single User
- Assigning a Preference Group to Multiple Users

To assign a preference group to a single user

1 Start the User Manager process.
The default location of this process is the Administration\Security Menu folder on the navigation bar.

Horizon opens the User Manager window:

2 Click the user you want to assign to a preference group.

3 Click Edit.

Horizon displays the User window with the Settings tab selected:

4 Choose the preference group that you want to assign to this user from the Preference Group menu.
5 If you want to let this user make changes to their individual preferences, mark the **Save User Preferences** box.

**IMPORTANT**

Unmarking this box does not remove any user preferences that are already saved.

6 Save your changes.

**To assign a preference group to multiple users**

1 Start the **User Manager** process.

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

   Horizon opens the User Manager window:

   ![User Manager Window](image)

2 Hold down the **CTRL** key and click the users you want.

3 When all the users you want to assign to a group are highlighted, click **Batch**.
Horizon displays the batch change window:

4 Choose the preference group you want to assign to this group of users from the Preference Group menu.

5 If you want to let these users make changes to their individual preferences, mark the Save User Preferences box.

**IMPORTANT**

Unmarking this box does not remove any user preferences that are already saved.

6 Click OK to save your changes.

---

**Changing a Preference Group**

If necessary, you can change a preference group. You can change the name of a local group, change the preferences for the site or a local group, or change the users assigned to a local group.

**IMPORTANT**

If you change preferences in a group that is above the user level, a user's individual preferences might override any changes you make to local groups or to the site group. To prevent this, you must make sure each user is assigned to the group you have changed and that they cannot modify their individual preferences. (For more information, see “Assigning a Preference Group to Users” on page 5-66.)

**To change a preference group**

1 Start the Preference Group Manager process.
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The default location of this process is the Administration folder on the navigation bar.

Horizon opens the Preference Group Manager window:

You can choose to change any site or local preference group in this menu.

2 Choose the group that you want to change from the Preference Group menu.

3 If you want to rename a local group, do these steps:

   1 Click Rename.
   Horizon displays the Preference Group name dialog box:

      Preference Group Name

   Name: Circulation

   OK Cancel

   2 Enter the new name for the group.
   (For example, enter “Circ - North Branch”.)
   Horizon renames the group and displays the new name in the group list.

4 If you want to change the preferences for this group, do these steps:

   1 Do one of these options at the Customize menu:
      • To set up Launcher preferences in this group, choose Launcher.
      • To set up MARC Editor preferences, choose MARC Editor.
   2 Click Modify.
   Horizon displays the customize window for the type of preferences you chose.
   3 Change the preferences:
      • To change the Launcher preferences, see the Launcher Configuration Guide.
      (If you want to add a view or a process, or assign switches to processes, see “Changing Administration-Level Settings on the Navigation Bar” on page 5-72.)
      • To change MARC Editor preferences, see the “Customizing the MARC Editor” chapter in the Cataloging Guide.
5 If you want to change the users assigned to this group, see “Assigning a Preference Group to Users” on page 5-66.

Deleting a Preference Group

You can delete a local preference group. (For example, if your users have configured their individual preferences to meet their needs or you have assigned them to a different local group, you might want to delete the old local group that is no longer needed.)

NOTE
You cannot delete the Site Preferences group.

To delete a preference group

1 Start the Preference Group Manager process.
   The default location of this process is the Administration folder on the navigation bar.
   Horizon opens the Preference Group Manager window.
2 Choose the group that you want to delete from the Preference Group menu.
3 Click Delete.
   Horizon displays a warning dialog box:

   ![Warning dialog box]
   This action will permanently remove this preference group and all preferences assigned to it.
   OK   Cancel

4 Click OK.
   Horizon deletes the group and all its preference settings.

NOTE
If you delete a group that has users assigned to it, these users will be reassigned to the site group. (For example, if you delete the Circulation group, Horizon will use the Site Preference Group for those users.)
If you want to assign those users to another group at the local level, see “Assigning a Preference Group to Users” on page 5-66.
Changing Administration-Level Settings on the Navigation Bar

You can change the navigation bar options within the Launcher to provide more functionality to your users. You can add a view or a process to the navigation bar and use command-line arguments, or “switches” to enhance the functionality of a view or a process. (These instructions are not included in the Launcher Configuration Guide because they are complex and must be controlled by the system administrator.)

You may want to do these things to let your users can see a certain type of list, access a specific view, or use a certain PAC flavor. (For example, if you want your user to be able to view the Title Request List, you can add the “/t” switch to the New Search process.)

(For more information on securing local processes and views, see “Securing a Local Process” on page 5-46.)

This section explains these topics:

- Adding a View as a Process to the Navigation Bar
- Adding a Process to the Navigation Bar
- Adding Command-Line Arguments to a View or Process
Adding a View as a Process to the Navigation Bar

By default, the navigation bar includes processes for views that let you access Table Editor functions without opening the Table Editor itself. (For example, the matham view is provided as a separate process for your convenience.) You can add additional views from the Table Editor to the navigation bar. You may want to do this to improve the workflow for a group of users. (For example, you can add the calendar_exceptions view to the navigation bar for your Circulation staff so that they can change holiday hours for the library when necessary.)

To add a view to the navigation bar

1. Start the Preference Group Manager process.
   The default location of this process is the Administration folder on the navigation bar.
   Horizon opens the Preference Group Manager window:

   ![Preference Group Manager Window]

2. Choose the group for which you want to change the Launcher settings.
3. Make sure Launcher is displayed in the Customize menu.
4. Click Modify.
   Horizon displays the Customize Launcher Site Preferences window.
5. Click the Navigation Bar tab.
6. Open the Administration folder in the model navigation bar.
7. Highlight the Table Editor.
8. Click Copy.
Horizon copies the Table Editor and lists the copy in the model navigation bar:

9 In the **Label** field, enter the label that describes the view you are adding. 
(For example, if you want to access the calendar_exceptions view, you might change the label to “Holiday Schedule View”.)

10 In the **Arguments** field, enter the arguments and switches to enable the correct view to start when you click the icon:

   `/vviewname`

   (For example, enter “/vcalendar_exceptions”.)

11 If you want to add switches to this view, use this format:

   `/switchargument /switch`

   (For example, enter “/vcalendar_exceptions /t”.)

**IMPORTANT**

When you enter switches and arguments, do not put spaces between the slash (/) and the switch letter and the argument that goes with it (for example “/fstafpac”).

If a switch does not need an argument to complete it, you can enter the switches in any order in the Arguments field, with or without spaces between them.

(For more information and examples, see “Switches” on page 5-80.)
12 Click on the view icon and drag it to the location in the model navigation bar where you want it to appear.

NOTE

When you drop the copy onto a folder, Horizon opens the folder and shows the copied process in its new location. To keep the icon from being placed inside the folder, hold down the SHIFT key.

13 Click Apply.
Horizon adds the new view to the navigation bar.

NOTE

This view is accessible to everyone assigned to the preferences group you are changing. If you want to secure this view so that only certain users in this preference group can use it, see “Securing a Local Process” on page 5-46.

Adding a Process to the Navigation Bar

You can add locally-defined processes to the navigation bar to give users access to programs or views that are not included by default. You can add these types of processes:

- **Horizon stand-alone programs.** Almost all Horizon processes are included on the navigation bar by default (though a user will only see those for which he or she has rights). The only exceptions are a handful of stand-alone programs (such as PUI Launcher or single Day End processes). While, you can run these programs from Windows Explorer or, in some cases, a command line, you may want to make them available to users right from the navigation bar.

- **Views.** Some general views are included on the navigation bar by default. However, there may be others that you want to make available to users so they can access them directly, without having to go through the Table Editor. (For instructions on adding a view to the navigation bar, see “Adding a View as a Process to the Navigation Bar” on page 5-73.)

- **Third-party applications.** You can add a process for any third-party programs that you want to make available from the navigation bar (for example, Microsoft Word or a web page).

You can secure local processes if needed. (For instructions, see “Securing a Local Process” on page 5-46.)

NOTE

If you try run multiple stand-alone processes (such as PUI Launcher and Horizon) against different databases, you may get an error message related to shared memory. (For more information, see “Error Message” on page 6-43.)

To add a process to the navigation bar

1 Start the Preference Group Manager process.
The default location of this process is the Administration folder on the navigation bar.
Chapter 5: Security and Preferences

Horizon opens the Preference Group Manager window:

2 Choose the group for which you want to change the Launcher settings from the Preference Group list.
3 Make sure Launcher is displayed in the Customize menu.
4 Click Modify.
   Horizon displays the Customize Launcher Site Preferences window.
5 Click the Navigation Bar tab.
6 Highlight the folder in the model navigation bar to which you want to add the process.
   (If you want to add a new folder, see “Adding a Folder to the Navigation Bar” in the Launcher Configuration Guide.)
7 Do one of these options:
   • If you know the path to the executable file for the process, enter the information in the Target field.
     For example, to add a process for the PUI Launcher program to the navigation bar, the path to the executable might be this: “c:\Horizon\PuiLauncher.exe”
   • If you do not know the path to the executable file for the process, do these steps:

   1 Click the Browse button to the right of the Target field.
   2 Find the executable (.exe) file in your Horizon folder for the process you want to add.
   3 Click Open.
      Horizon enters the path to the file in the Target field.
8 If you want to add switches or arguments to this process, enter them in the Arguments field using this format:
   /switchargument /switch
   (For example, enter “/j235 /t”.)

   IMPORTANT
   When you enter switches and arguments, do not put spaces between the slash (/) and the switch letter and the argument that goes with it (for example “/fstafpac”).
   If a switch does not need an argument to complete it, you can enter the switches in any order in the Arguments field, with or without spaces between them.
(For more information and examples, see “Switches” on page 5-80.)

9 Click OK. Horizon saves your settings and closes the Customize Launcher window.

10 To test the new process, double-click the process in the actual navigation bar in your Horizon environment.

**NOTE**

This process is accessible to everyone assigned to the preferences group you are changing. If you want to secure this process so that only certain users in this preference group can use it, see “Securing a Local Process” on page 5-46.

### Adding Command-Line Arguments to a View or Process

You can customize existing Horizon processes or views by entering specific commands and switches. If you add a new view to the navigation bar, you must enter the “/v” switch and the correct process name in order for Horizon to open the view when you click on the option in the menu. You may also want to add switches if a process needs to open using specific parameters every time. (For example, to let your staff members view a Title Request List, add the “/t” [technical] switch to the View process. For more information on the specific switches you can use, see “Switches” on page 5-80.)

Arguments are used to enhance the flexibility of a process or to provide additional information when a process is activated. These arguments are added within a specific preference group and apply to all the users of that preference group.

**IMPORTANT**

If you change preferences in a group that is above the user level, a user’s individual preferences might override any changes you make to local, site, or more general groups. To prevent this, you must make sure each user is assigned to the group you have changed and that they cannot modify their individual preferences. (For more information, see “Assigning a Preference Group to Users” on page 5-66.)
To add arguments to a process

1. Start the Preference Group Manager process.
   The default location of this process is the Administration folder on the navigation bar.
   Horizon opens the Preference Group Manager window:

   ![Preference Group Manager window](image)

2. Choose the group for which you want to change the Launcher settings from the Preference Group list.
3. Make sure Launcher is displayed in the Customize menu.
4. Click Modify.
   Horizon displays the Customize Launcher window.
5. Click on a Navigation Bar tab.
6. Click on the folder that contains the process for which you want to add an argument or a switch.
   (For example, to add an argument to the New Search process, click on the Searching folder.)
7. Click on the process within the folder.
   (For example, click on New Search within the Searching folder.)
Horizon displays the Arguments field on the Navigation Bar tab:

8 In the Arguments field, enter the arguments and switches that you want to apply to the highlighted process using this syntax:

```
/switch/argument  /switch
```

(For example, enter “/fstafpac /t”).

**IMPORTANT**

When you enter switches and arguments, do not put spaces between the slash (/) and the switch letter and the argument that goes with it (for example “/fstafpac”).

If a switch does not need an argument to complete it, you can enter the switches in any order in the Arguments field, with or without spaces between them.

(For more information and examples, see “Switches” on page 5-80.)

9 Click OK.
Switches

Switches are commands that activate various features in the Horizon processes. They are called switches because they let you “switch” features on and off. This section shows the argument syntax, or “switches,” you can enter to add a certain type of functionality to a process. (For example, you can add a switch that lets Horizon import a record as non-MARC.)

You add switches in the Arguments field of the Navigation Bar tab of the Customize Launcher window. (For instructions, see “Changing Administration-Level Settings on the Navigation Bar” on page 5-72.)

**IMPORTANT**

When you enter switches and arguments, do not put spaces between the slash (/) and the switch letter and the argument that goes with it (for example “/fstafpac”).

If a switch does not need an argument to complete it, you can enter the switches in any order in the Arguments field, with or without spaces between them.

<table>
<thead>
<tr>
<th>Switch</th>
<th>Description</th>
<th>Arguments</th>
<th>Example</th>
<th>Applicable Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>/1</td>
<td>Specifies that borrowers must enter a barcode for each item they check out in Self-Service Checkout. This prevents other borrowers from checking out an item using a previous borrower’s barcode. (For more information, see “Checking Out an Item Using Self-Service Checkout” in the “Checkout and Checkin” chapter of the Circulation Guide.)</td>
<td>None</td>
<td>/1</td>
<td>Self-serve Checkout</td>
</tr>
<tr>
<td>/b</td>
<td>Specifies that the borrower’s barcode is automatically provided when the borrower places a request or makes a booking. (Horizon bypasses the borrower prompt altogether.) This switch lets you set up a “dummy” borrower record to limit the scope of what the borrower can see by defining security groups in the borrower record. Horizon uses this switch only if the workstation is used exclusively by one borrower (for example, for a workstation in a borrower’s private office).</td>
<td>None</td>
<td>/b</td>
<td>New Search</td>
</tr>
<tr>
<td>/c</td>
<td>Specifies that the LC Call Number searches are case sensitive.</td>
<td>None</td>
<td>/c</td>
<td>New Search</td>
</tr>
<tr>
<td>Switch</td>
<td>Description</td>
<td>Arguments</td>
<td>Example</td>
<td>Applicable Processes</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>-----------</td>
<td>---------</td>
<td>---------------------</td>
</tr>
<tr>
<td>/f</td>
<td>Specifies the PAC flavor a search process uses.</td>
<td>The PAC flavor</td>
<td>/fstafpac</td>
<td>New Search</td>
</tr>
<tr>
<td></td>
<td>In Cataloging, staff users have the option to choose a flavor to use in the Browse Link set up. If users choose a different flavor, this choice overrides the setting of the “/f” switch as long as they are using Browse Link.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>/j</td>
<td>Specifies the limit (maximum number) of records that Horizon loads into memory from the database when users do an alphabetical search. The default is 500. The minimum setting allowed is 200. If users scroll down to view more records, Horizon trims some records out of memory to make room for more records.</td>
<td>The number of records</td>
<td>/j235</td>
<td>New Search</td>
</tr>
<tr>
<td>/k</td>
<td>Specifies the number of records that Horizon keeps in memory after it has reached the limit specified by the “/j” switch, and begins to trim out records to display more records from the database. The default is 400. The minimum setting allowed is 100. Horizon displays an hourglass while it searches the database.</td>
<td>The number of records</td>
<td>/j250</td>
<td>New Search</td>
</tr>
<tr>
<td>/m</td>
<td>Specifies the number of records that display after users resume a keyword search in staff searching. The default setting is 300. The minimum setting allowed is 300. (For keyword searches, Horizon displays only the first 30 records. Users then click the Resume button to continue searching. If there are additional records, users can click the Resume button again to display them.)</td>
<td>The number of records</td>
<td>/m425</td>
<td>New Search</td>
</tr>
<tr>
<td>/n</td>
<td>Specifies importing records as non-MARC.</td>
<td>None</td>
<td>/n</td>
<td>Import</td>
</tr>
<tr>
<td>Switch</td>
<td>Description</td>
<td>Arguments</td>
<td>Example</td>
<td>Applicable Processes</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>/t</td>
<td>Specifies the number of seconds that CKI message dialog boxes are active on the screen. The default setting is six seconds. (For example, if you want the message boxes to shut down more quickly, enter “/t3” to set the timeout interval to three seconds.)</td>
<td>The number of seconds</td>
<td>/t5</td>
<td>Check In</td>
</tr>
<tr>
<td>/t</td>
<td>Specifies that the Detail Status button is available in the Copies window and displays secured bib records (records secured by the 911 tag). The Detail Status button lets users view detailed information about the item, including order information and the last borrower to check out the item. Specifies that these options are available in the Request menu: • View Title Request List • View Title Booking List</td>
<td>None</td>
<td>/t</td>
<td>New Search</td>
</tr>
<tr>
<td>/v</td>
<td>Specifies the use of all match points when importing records.</td>
<td>None</td>
<td>/v</td>
<td>Import</td>
</tr>
<tr>
<td>/v</td>
<td>Specifies which view you are adding when you add a new process on the navigation bar for a specific Table Editor view. (For more information, see “Adding a View as a Process to the Navigation Bar” on page 5-73.)</td>
<td>The name of the view</td>
<td>/vbtype</td>
<td>A copy of the Table Editor process</td>
</tr>
</tbody>
</table>
This chapter explains what tasks you should do to properly maintain your Horizon system and when they should be done. In addition, this chapter explains how to use Day End processing, and how to create statistical reports about your Horizon system. This chapter also explains how to get help for problems that arise while using Horizon.

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Maintenance Schedules 6-3
Database Maintenance Tasks 6-7
Day End 6-9
Day End and AdHoc Reports 6-26
Getting Help 6-36
About Maintenance and Day End

As a system administrator, you should perform regular maintenance on your Horizon system. Regular maintenance helps ensure that your system continues to work properly. SirsiDynix recommends that certain system maintenance tasks be done daily, weekly, monthly, and semiannually.

In addition to your regular system maintenance, you run the Day End program. This program compiles daily changes to records from Horizon and performs other system functions, such as compiling statistics. After you run Day End, you can run reports of system statistics from the AdHoc Report Generator.

This chapter also explains ways to get help if you run into problems while using Horizon. (For example, you may need to run a debug program.)

This chapter explains these topics:

- Maintenance Schedules
- Database Maintenance Tasks
- Day End
- Day End and AdHoc Reports
- Getting Help

Maintenance Schedules

SirsiDynix recommends that you do specific tasks regularly to maintain the integrity of your system. This section lists things that you can do to find out how your system is being used and how to keep it running smoothly. This section contains schedules of tasks that SirsiDynix recommends you do on a daily, weekly, monthly, or semiannual basis. The tables in this section list the recommended maintenance tasks, a description of what each tasks does, and where to find instructions on how to complete the task.

**NOTE**

The schedules given here are just examples and may not include all the tasks that your system requires. You should make a schedule that meet your system’s specific needs.

This section explains these topics:

- Daily Maintenance Schedule
- Weekly Maintenance Schedule
- Monthly Maintenance Schedule
- Semiannual Maintenance Schedule
Daily Maintenance Schedule

Recommended daily maintenance includes tasks such as running reports for hold lists, printing overdue notices, printing the daily circulation statistics report, and running Day End.

<table>
<thead>
<tr>
<th>Task</th>
<th>Purpose</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run any daily reports you want.</td>
<td>Prints various kinds of reports, such as hold lists circulation statistics, and so on.</td>
<td>“Day End and AdHoc Reports” on page 6-26. Refer also to the documentation for the specific reports that you want to run.</td>
</tr>
<tr>
<td><strong>NOTE</strong> You can set up Day End to generate reports automatically.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print any notices you want.</td>
<td>Prints various kinds of notices, such as overdue or hold notices.</td>
<td>“Defining Notices, Invoices, and Reminders” in the Circulation Setup Guide and the “Viewing and Sending Notices” chapter of the Circulation Guide.</td>
</tr>
<tr>
<td>Back up your SQL transactions.</td>
<td>Creates a backup of all SQL transactions that occurred that day.</td>
<td>“Backing Up Your Database” on page 6-8.</td>
</tr>
<tr>
<td><strong>NOTE</strong> Check the log file to verify that the backup completed successfully.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Weekly Maintenance Schedule

Recommended weekly maintenance includes tasks such as backing up your system accounts, rebooting your system, and running the weekly circulation statistics report.

<table>
<thead>
<tr>
<th>Task</th>
<th>Purpose</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run any weekly reports that you want.</td>
<td>Prints various kinds of reports, such as hold lists for patrons and staff, circulation statistics, and so on.</td>
<td>“Day End and AdHoc Reports” on page 6-26. Refer to the documentation for the specific reports that you want to run.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>You can set up Day End to generate reports automatically.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run Database Consistency Check (DBCC).</td>
<td>Checks the integrity of your database.</td>
<td>“Running Database Consistency Check (DBCC)” on page 6-7.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check the log file to verify that DBCC completed successfully.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Back up your SQL database.</td>
<td>Creates a backup of your entire SQL database</td>
<td>“Backing Up Your Database” on page 6-8.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check the log file to verify that the backup completed successfully.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Back up your server files.</td>
<td>Creates a backup of essential server files using the backup capabilities of your server.</td>
<td>Refer to the documentation for your specific operating system.</td>
</tr>
<tr>
<td>Shut down and reboot your system after the backup.</td>
<td>Clears memory and aborted processes.</td>
<td>Refer to the documentation for your specific operating system.</td>
</tr>
</tbody>
</table>
## Monthly Maintenance Schedule

Recommended monthly maintenance includes tasks like backing up your data, cleaning your tape drive, and running a monthly circulation statistics report.

<table>
<thead>
<tr>
<th>Task</th>
<th>Purpose</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run any monthly reports that you want.</td>
<td>Prints various kinds of reports, such as hold lists for patrons and staff, circulation statistics, and so on.</td>
<td>“Day End and AdHoc Reports” on page 6-26. Refer to the documentation for the specific reports that you want to run.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td>You can set up Day End to generate reports automatically.</td>
<td></td>
</tr>
<tr>
<td>Check your database free space.</td>
<td>Shows the amount of free space in your database.</td>
<td>Refer to the documentation for your specific database.</td>
</tr>
<tr>
<td>Check your server free space.</td>
<td>Shows the amount of free space on your server.</td>
<td>Refer to the documentation for your specific operating system.</td>
</tr>
<tr>
<td>Back up your operating system.</td>
<td>Creates a monthly backup of your operating system.</td>
<td>Refer to the documentation for your specific operating system.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td>Check the log file to verify that the backup completed successfully.</td>
<td></td>
</tr>
<tr>
<td>Delete any old or unused files or directories from the server.</td>
<td>Frees up server space by eliminating old, unnecessary files. Speeds up overall server performance.</td>
<td>Refer to the documentation for your specific operating system.</td>
</tr>
</tbody>
</table>
Semiannual Maintenance Schedule

Recommended semiannual maintenance includes tasks such as changing your system login names and passwords, validating and rebuilding indexes, and updating your system date and time for Daylight Savings Time.

<table>
<thead>
<tr>
<th>Task</th>
<th>Purpose</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change your Horizon system administration and user passwords, and database passwords.</td>
<td>Keeps hackers and other unauthorized users from breaking into your system.</td>
<td>“Updating Security” on page 5-36. Refer also to the documentation for your database.</td>
</tr>
<tr>
<td><strong>NOTE</strong> If you want to have a user change his or her own password, you can set up a user password to expire automatically.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>At Daylight Savings Time, change the date and time on your system.</td>
<td>Helps the system calculate fines and due dates correctly.</td>
<td>Refer to the documentation for your specific operating system.</td>
</tr>
</tbody>
</table>

Database Maintenance Tasks

As a system administrator, you must perform a variety of database maintenance tasks on a regular basis, such as backing up your database. In addition, you are responsible to design and implement a plan in case of system and database failure. The information in this section assumes that you understand basic database administration, including how to use a SQL query tool to query your database.

This section explains these topics:

- Running Database Consistency Check (DBCC)
- Backing Up Your Database
- Restoring Your Database

Running Database Consistency Check (DBCC)

Before you back up your database, you must run a Database Consistency Check (DBCC) to check the logical and physical consistency of your database. This check ensures that you get an accurate backup of your Horizon database. To ensure that you have an error-free backup, the DBCC process must be error-free.

You can create your own Database Consistency Checker to check your database. (For more information, refer to your Sybase System Administrator documentation.)

This section explains these topics:

- Checking for Any Users Who Are Logged On
Chapter 6: Maintenance and Day End

- Running the Database Consistency Check (DBCC)
- Checking the Error Log

Checking for Any Users Who Are Logged On

Before you can run DBCC, you need to check for any users who are logged on to Horizon, or who are using any programs that access the database. (For example, you might want to run an “sp_who” command.) Once you identify the users and programs, make sure all users log out (or terminate their connections manually), and quit all programs that access the database. You can repeat this process until all users are logged out and all programs are closed.

Running the Database Consistency Check (DBCC)

Once you have made sure all users have exited the database, you can run the Database Consistency Check (DBCC) to check the consistency of your database. The DBCC process can take a long time to complete. Generally, you should do this process during off-hours. Do not attempt to access the database during DBCC.

Checking the Error Log

After DBCC completes, you must check the error log to see if the DBCC process found any database errors. If the DBCC results show any errors, do not continue with your backup until you resolve the errors. For example, you may search the log file for these terms to locate any errors:

- msg
- corrupt
- err

Backing Up Your Database

You should regularly backup your database by doing a dump of your database. When you do a dump of your data, you save the data into a backup file. In addition to the backup file, a log table on the database automatically records every transaction that involves or affects the database. You cannot turn the logging feature off, but you can set up the database so that it will truncate the log file. This prevents the log file from filling up. (For instructions on how to set up the log file to be truncated, see your Sybase System Administrator documentation.)

NOTE

Before you back up your database, you need to run DBCC, if you have not already done so.

When you back up your SQL database, you do these tasks:

- **Back up your SQL transaction log.** This database log automatically records every transaction that involves or affects the database. You need to back up this log before you dump your database.
• **Back up your SQL database.** You back up your database by creating a dump of your database. This dump is a backup file that you can load (with the transactions logs) if you need to restore your database.

**NOTE**
Be sure that when you back up your transaction log or database you do not overwrite previous transaction or database backup files.

---

**Restoring Your Database**

You can restore your database if you need to. To restore your database, you first load the most recent database dump (backup file), and then load, in order, all the transaction log dumps made since the last database dump. This process restores the database to its state at the time of the last transaction log dump.

You cannot use the database you are restoring during the load. If the “load transaction” command is running, database users will receive a message telling them that the database is in the process of being loaded.

**IMPORTANT**
Be careful when restoring databases or transaction logs. Usually, you do not want to overwrite your current database with old data from a prior backup. If you have any questions about restoring your database, contact Horizon Customer Support.

---

**Day End**

The Day End program compiles daily changes in records from Horizon and performs other system functions. (For example, Day End tracks overdue fines, generates notices, and deletes old statistics.) Day End is made up of several processes that compile daily, weekly, and monthly changes to Horizon records. Each process compiles data or statistics for a certain type of process, such as the amount of overdue fines, number of checkouts, and so forth.

You should run Day End every day, most likely at the end of the day before you leave. If you miss one or two days, you do not need to run Day End for the missed days. Day End updates all records and statistics up to the date you run it for.

**IMPORTANT**
You need to run the Day End process only once for each Horizon database. You do not need to run Day End for each location.

This section explains these topics:

* Running Day End
* Configuring Day End Parameters
* Horizon starts the process and displays the Day End monitor window for that process. A red bar moves across the window as the process runs:
* Monitoring the Day End Activity Log
Running Day End

You should run Day End only once each day for the entire system. There are two ways to start Day End: automatically or manually.

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatically</td>
<td>You set Day End to start automatically at a specified time each day. You must set up Day End if you want it to run automatically. (For instructions, see “Configuring Day End Parameters” on page 6-12.)</td>
</tr>
<tr>
<td>Manually</td>
<td>You can start Day End at anytime, regardless of any pre-set time.</td>
</tr>
</tbody>
</table>

You can also run a single Day End process any time without starting the entire Day End program.

This section explains these topics:

- Guidelines for Running Day End Processes
- Running Day End Processes Automatically
- Running Day End Processes Manually

Guidelines for Running Day End Processes

You should run Day End every day, most likely at the end of the day before you leave. As you run Day End, follow these guidelines:

- Run Day End once to update all Horizon processes associated with a single database.
  If your library uses more than one database, you must run Day End for each database.
- Run Day End from only one of your locations. Once started, Day End automatically completes its processes for all other locations on your system. Individual locations do not need to run Day End.
- Day End must be open on a workstation either as a full screen or as an icon to run. Set up a startup service to include Day End at the workstation that runs Day End. When you log on to the workstation, Day End will be ready to run at its start time.
- Do not turn off the power to the workstation where you run Day End.
- Run Day End while your library is closed, or, if your library is always open, at the least busiest time. This will avoid slowing down other Horizon applications. However, even if Day End is not completed for the previous day, you can work with other processes on the same workstation while Day End finishes.
- Run Day End before 12:00 midnight. Each new Day End cycle begins every day at 12:00 midnight. If you run Day End after 12:00 midnight for the previous day, Day End compiles no statistics for the previous day.

Running Day End Processes Automatically

You can set up Day End processes to run automatically at the end of each day. You can set a specific time for Day End to run and then print statistical reports of the day’s transactions. Once you set up Day End to run automatically, it will run every day at a specified time until you change Day End parameters.
(For instructions on how to set up Day End to run automatically, see “Configuring Day End Parameters” on page 6-12.)

Running Day End Processes Manually

At any time, you can run a single Day End process manually to immediately update changes in Horizon. (For example, you may want to update item statuses or clear the New Titles List in staff searching staff searching.)

*WARNING*

Running certain Day End processes out of order or without proper arguments can corrupt data.

You can run a single Day End process in two ways: starting it from the Horizon Launcher, or starting it from the program’s executable file.

If you want to start a single Day End process from the Horizon Launcher, you must first add it as a process to the navigation bar or as a button to the toolbar. (For instructions on adding a process to the navigation bar or a button to the toolbar, see the Horizon Launcher Configuration Guide.)

NOTE

If you will be running a single process regularly, SirsiDynix recommends that you add the process to the Launcher for easier access.

If you are running a single Day End process from the program’s executable file, you need to know two things:

- The path to the directory where the Day End program name, or executable, is stored. The default directory location is the folder where your Horizon client files are installed.
  
  If you do not know where the process is stored, you can contact SirsiDynix Customer Support.

- The name of the process. (For a detailed list of all Day End processes, see “Horizon starts the process and displays the Day End monitor window for that process. A red bar moves across the window as the process runs:” on page 6-12.)

NOTE

Horizon lets Day End run only once for each calendar day and will not let you run Day End manually for a date in the future.

To run a single Day End process manually

1 Log in to Horizon.
Do one of these tasks:

<table>
<thead>
<tr>
<th>To run the process from the Launcher</th>
<th>To run the process from the executable file</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Make sure the navigation bar is showing inside the Horizon workspace. If you need to display the navigation bar, choose View, Navigation Bar. 2 If necessary, click the plus sign (+) next to the folder where the process is stored. 3 Double-click the Day End process you want. (For example, double-click Purge Bib History.)</td>
<td>1 In Windows Explorer, open the folder where Horizon is installed. 2 Double-click the executable file for the Day End process that you want to run. (For example, you would double-click the DeBurbHi.exe file if you wanted to run the Purge Bib History Day End process.)</td>
</tr>
</tbody>
</table>

Horizon starts the process and displays the Day End monitor window for that process. A red bar moves across the window as the process runs:

You can also run all Day End processes from the command line, which is particularly useful if you want Day End to run upon restart or within any other scripted process.

**To run all Day End processes from the command line**

1. From the command prompt, navigate to the directory where the Day End program name, or executable, is stored. The default directory location is the folder where your Horizon client files are installed.
2. Enter this command to start the Day End program, followed by the “/t” switch, in this format:
   de.exe /t
   This allows Day End to start with the Automatic button already pushed.

**Configuring Day End Parameters**

Before Horizon can run Day End automatically, you must set up parameters that determine which processes run with your Day End schedule, when your Day End schedule runs, and the frequency of a Day End process. You can change these parameters at any time.

This section explains these topics:

- Viewing the Processes in Your Day End Schedule
- Adding or Removing a Process from the Day End Schedule
- Changing the Frequency of a Process
• Setting Up the Default Start Time

**Viewing the Processes in Your Day End Schedule**

By default, your Horizon system is installed with certain Day End processes on your Day End schedule. Your Day End schedule is what processes run when you start Day End. Because your Day End schedule is set up during Horizon installation, you may need to view the processes that will run with your Day End schedule to make sure you have the processes on the schedule that you want to run, or to exclude certain processes that you do not want to run. (In addition, when you upgrade to newer versions of Horizon, you may need to add the new processes that are part of the upgrade to your Day End schedule.)

The processes run in a system-defined order that you cannot change. Before you run Day End for the first time, you should check the processes that are with Day End. Horizon stores all active Day End processes on the MDayEnd menu and all inactive processes on the MDESave menu. You add or remove a process from the Day End schedule by moving it from the active menu to the inactive menu and vice versa.

**To view the processes in your Day End schedule**

1. Open the **menu** view in the Table Editor.
   Horizon displays a list of menus and menu options.

2. Choose **File, Search**.
   Horizon displays the List Search window.

3. Enter “MDayEnd” in the **Search for** field.
   Horizon displays the Day End options on the MDayEnd menu. Each option represents a process that runs in your schedule.
   (For detailed information on Day End menu options, see “Horizon starts the process and displays the Day End monitor window for that process. A red bar moves across the window as the process runs:” on page 6-12.)

4. If you want to add or remove processes to this schedule, see “Adding or Removing a Process from the Day End Schedule” on page 6-13.

**Adding or Removing a Process from the Day End Schedule**

If you want to, you can add or remove processes from your Day End schedule. (For example, you may not need to run the DeRbrAc process, and may want to remove it from your Day End schedule.)

Horizon stores all active Day End processes on the MDayEnd menu and all inactive processes on the MDESave menu. You add or remove a process from the Day End schedule by moving it from the active menu to the inactive menu and vice versa.

**NOTE**
A process on the MDESave menu will continue to run if it is still on the MDayEnd menu. Once you have added a process to the MDESave menu, remove it from the MDayEnd menu to ensure it does not run as part of your Day End schedule.

**To add or remove a process from the Day End schedule**

1. Open the **menu** view in the Table Editor.
Horizon displays a list of menus and their options.

2 Choose **File, Search** to display the Search List window.

3 Do one of these options:
   - If you want to remove an option from this menu, search for the **MDayEnd** menu.
   - If you want to move an option to the active MDayEnd menu, search for the **MDESsave** menu.

   Horizon displays the MDayEnd menu or the MDESsave menu.

4 Double-click the Day End option that you want to move from one menu to the other.
   (For detailed information on Day End menu options, see “Horizon starts the process and displays the Day End monitor window for that process. A red bar moves across the window as the process runs.” on page 6-12.)

   Horizon displays the Edit Menus view. The Menu field displays either the active MDayEnd menu or the inactive MDESsave menu.

5 Do one of these options in the **Menu** field:
   - If you want to move the process to the inactive menu, enter “MDESsave”.
   - If you want to move the process to the active menu, enter “MDayEnd”.

6 Save your changes.
Changing the Frequency of a Process

If you want to, you can change how often a process in the Day End schedule runs. You can specify whether each the process runs daily, weekly, monthly, or annually.

To change the frequency of a process

1. Do one of these options:
   - If you know the name of the menu option for the Day End process, open the **menu_option** view, choose the Day End menu option, then go to step 9.
   - If you do not know the name of the menu option, open the **menu** (XIMop Menus) view in the Table Editor. (For a detailed list of Day End processes, see “Horizon starts the process and displays the Day End monitor window for that process. A red bar moves across the window as the process runs:” on page 6-12.)

2. Choose **File, Search**.
   Horizon displays the Search List window.

3. Choose the **Menu** search index.

4. Enter “MDayEnd” in the **Search for** field.

5. Click **OK**.
   Horizon lists the MDayEnd menu and its active options.

6. Double-click the Day End process whose frequency you want to change.
   Horizon displays the Edit Menu window:

   ![Edit: Menus](image)

7. Click the **Codes** button to the right of the Menu Option field in the Edit Menus window.
   Horizon displays the Code Lookup window with a list of processes, only a few of which apply to Day End.

8. Click once to highlight the menu option for which you are changing the frequency.

9. Click **Edit**.
Chapter 6: Maintenance and Day End

Horizon displays the Edit Menu Options window:

![Edit Menu Options window]

10 Enter the new frequency in the **Arguments** field.
You can choose a frequency from this list:

<table>
<thead>
<tr>
<th>Enter this</th>
<th>To run the process</th>
</tr>
</thead>
<tbody>
<tr>
<td>/d</td>
<td>daily</td>
</tr>
<tr>
<td>/w</td>
<td>weekly</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>You can also control the</td>
</tr>
<tr>
<td></td>
<td>specific day of the week</td>
</tr>
<tr>
<td></td>
<td>that Day End runs the</td>
</tr>
<tr>
<td></td>
<td>process by entering the</td>
</tr>
<tr>
<td></td>
<td>number of the day of the</td>
</tr>
<tr>
<td></td>
<td>week. Days of the week</td>
</tr>
<tr>
<td></td>
<td>are numbered 0 to 6</td>
</tr>
<tr>
<td></td>
<td>starting with Sunday.</td>
</tr>
<tr>
<td></td>
<td>(For example, you can</td>
</tr>
<tr>
<td></td>
<td>enter “/w1” to run the</td>
</tr>
<tr>
<td></td>
<td>process on Monday, “/d2”</td>
</tr>
<tr>
<td></td>
<td>to run the process on</td>
</tr>
<tr>
<td></td>
<td>Tuesday, and so forth.)</td>
</tr>
<tr>
<td></td>
<td>If you do not add a</td>
</tr>
<tr>
<td></td>
<td>number to the /w, the</td>
</tr>
<tr>
<td></td>
<td>process will run</td>
</tr>
<tr>
<td></td>
<td>on Sunday.</td>
</tr>
<tr>
<td>/m</td>
<td>monthly</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>You can also control the</td>
</tr>
<tr>
<td></td>
<td>specific day of the</td>
</tr>
<tr>
<td></td>
<td>month that Day End runs</td>
</tr>
<tr>
<td></td>
<td>the process by entering</td>
</tr>
<tr>
<td></td>
<td>the number of the day in</td>
</tr>
<tr>
<td></td>
<td>the month. (For example,</td>
</tr>
<tr>
<td></td>
<td>you can enter “/m1” to</td>
</tr>
<tr>
<td></td>
<td>run the process on the</td>
</tr>
<tr>
<td></td>
<td>first day of the month,</td>
</tr>
<tr>
<td></td>
<td>“/w15” to run the process</td>
</tr>
<tr>
<td></td>
<td>on the fifteenth day of</td>
</tr>
<tr>
<td></td>
<td>the month, and so forth.)</td>
</tr>
<tr>
<td>/a</td>
<td>annually</td>
</tr>
</tbody>
</table>

11 Save your changes.
Setting Up the Default Start Time

You set up the default time you want Day End to run in the matham view. (For more information about the matham view, see “System-Wide Settings” on page 2-4.) When Day End starts, Horizon displays the Day End Manager window:

This window tells you what time Day End is set to start, the last date it was run, and the date it is set to run next. Also provided are four buttons:

- **Automatic.** Lets you start Day End at the default time.
- **Manual.** Lets you start Day End immediately before the default time.
- **Cancel.** Cancels the Day End program.
- **About.** Opens a window that displays the software version and database currently running on your workstation.

**NOTE**

Horizon lets Day End run only once for each calendar day and will not let you run Day End manually for a date in the future.

A Listing of Day End Processes

Day End Processing runs several processes. You can customize which processes run during Day End. The Day End Process table lists this information about each process:

- The name of each Day End process.
- The name of each Day End menu option.
- The name of each Day End program.
- A description of each Day End process.

You can use the information in this section as you perform Day End tasks. (For more information on performing Day End tasks, see “Adding or Removing a Process from the Day End Schedule” on page 6-13 and “Running Day End” on page 6-10.)

These Day End processes are listed in the order they run by default:
<table>
<thead>
<tr>
<th>Process</th>
<th>Menu Option</th>
<th>Program Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Overdues</td>
<td>OverDue</td>
<td>deoverdu.exe</td>
<td>Changes items that remain checked out, with due dates that have passed, to the status of “Overdue.”</td>
</tr>
<tr>
<td>Purge Circ</td>
<td>CircHis</td>
<td>decirchi.exe</td>
<td>Deletes old circulation information about the previous borrower of an item. (You specify the number of days that must elapse before circulation information is purged in the itype table. For more information, see “Defining Item Circulation Types [ITYPES]” in the “Preparing Horizon to work with Item Records” section of the Circulation Setup Guide.)</td>
</tr>
<tr>
<td>Purge Requests</td>
<td>ExpHold</td>
<td>deexphol.exe</td>
<td>Resets the status for “Items Being Held” to “Checked In” when the hold expiration date is reached and generates a notice to inform the borrower.</td>
</tr>
<tr>
<td>Purge Burbs</td>
<td>PurgNot</td>
<td>deburb.exe</td>
<td>Moves obsolete blocks to the burb history file.</td>
</tr>
<tr>
<td>Purge Words</td>
<td>Word</td>
<td>deword.exe</td>
<td>Deletes keywords from the keyword index that no longer have any references.</td>
</tr>
<tr>
<td>Process</td>
<td>Menu Option</td>
<td>Program Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Purge New Bibs</td>
<td>NewBib</td>
<td>denewbib.exe</td>
<td>Clears out the New Titles list in staff searching. (You specify the number of days that a title must remain in the list before this process clears in the matham view.) (For more information, see “System-Wide Settings” on page 2-4.)</td>
</tr>
<tr>
<td>Purge Burb History</td>
<td>BurbHis</td>
<td>deburbhi.exe</td>
<td>Deletes past blocks after a specified amount of time. (You set this time [days] for each block type in the block view. For more information, see “Setting Up or Editing a Block Type” in the Circulation Setup Guide.)</td>
</tr>
<tr>
<td>Purge Deleted Items</td>
<td>PurgIte</td>
<td>deitems.exe</td>
<td>Removes from the database any items that library staff have deleted. (Note that the items are removed from the indexes at the time of the original delete.)</td>
</tr>
<tr>
<td>Purge Deleted Bibs</td>
<td>PurgBib</td>
<td>debibs.exe</td>
<td>Removes from the database all bibs that library staff have deleted. (Note that bibs are removed from the indexes at the time of the original delete.)</td>
</tr>
<tr>
<td>Age Item Status</td>
<td>AgeItem</td>
<td>deitmsst.exe</td>
<td>Changes the status of items to the next specified status after a given amount of time. (For example, items with a status of “Lost” change to a status of “Missing” after the number of days have elapsed specified in the location view.)</td>
</tr>
<tr>
<td>PO Complete</td>
<td>DePoCmp</td>
<td>depocomp.exe</td>
<td>Rolls a PO over to a status of “Complete.”</td>
</tr>
<tr>
<td>Acquisitions</td>
<td>DeAcqCl</td>
<td>deacqclm.exe</td>
<td>Generates claims for items ordered through Acquisitions.</td>
</tr>
<tr>
<td>Serials Claims</td>
<td>DeSerCl</td>
<td>deserclm.exe</td>
<td>Generates claims for serial issues that have not arrived. (Horizon assigns a “Claim” status to issues according to claims parameters set up in the issue’s copy record.) (If you want to force a claim on an issue, you must change the status of an issue to “Claim” before you run this Day End process.)</td>
</tr>
<tr>
<td>Process</td>
<td>Menu Option</td>
<td>Program Name</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Purge Expired Advance Bookings</td>
<td>PurgABK</td>
<td>deadbook.exe</td>
<td>Deletes bookings that have expired.</td>
</tr>
<tr>
<td>Purge PO Line Item Histories</td>
<td>PurgPoL</td>
<td>depolihi.exe</td>
<td>Purges PO line activity (such as ordered, received, and so forth) when the date set in the po_activity_type view has passed. (This process also sets the days of retention for the specific activity type.)</td>
</tr>
<tr>
<td>Update Reserve Room ICT Activity</td>
<td>DeRbrAc</td>
<td>derbract.exe</td>
<td>Changes the active status of reserved items from active to inactive and vice versa when the activation and reactivation dates in the ICT record passes.</td>
</tr>
<tr>
<td>Update Locations Summary</td>
<td>Upd49b</td>
<td>deupd049.exe</td>
<td>Updates summary of locations that have copies of a particular bib. (This option and appropriate staff searching configurations are useful only if your database includes several location options which are physically far apart. Updating holding locations lets bib-level displays show where copies of a title are without having to display the Copies list.)</td>
</tr>
<tr>
<td>Day End Notice Fine</td>
<td>DeNoFin</td>
<td>denofin.exe</td>
<td>Creates fines for every notice generated, regardless of the number of items on the notice.</td>
</tr>
<tr>
<td>Pending MARC Send Output</td>
<td>PMSOut</td>
<td>depmsout.exe</td>
<td>Puts into a file all changes in bib and holdings records that have occurred since the last time PMSOut was run. (This process is necessary only for those libraries that have two or more servers and need their bib and circulation databases synchronized.)</td>
</tr>
</tbody>
</table>
### Day End

<table>
<thead>
<tr>
<th>Process</th>
<th>Menu Option</th>
<th>Program Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day End Stat Processing</td>
<td>DeStats</td>
<td>destat.exe</td>
<td>Gathers daily statistics on various library activities such as checkouts,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>then, if flagged to do so, generates reports for these statistics. Day End</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>collects and groups reports of circulation activities by:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• ITYPES</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• BTYPES</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• ISTATs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• BSTATs</td>
</tr>
<tr>
<td>Day End Stat Processing Monthly</td>
<td>DeStatM</td>
<td>destat.exe</td>
<td>Gathers statistics on a monthly basis. (This version of Stat Processing</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>takes longer to run than the daily Day End Stat process.) DeStatM does this:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Gathers monthly snap shot statistics, such as item stats and borrower</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>stats.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Removes obsolete statistics, such as retention days.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Collapses statistics, such as a past year’s daily circulation statistics</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>into a year’s statistics.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Prints daily and monthly reports.</td>
</tr>
<tr>
<td>Update Current Address for Borrowers</td>
<td>MBAupd</td>
<td>deboradr.exe</td>
<td>Updates the borrower address table to reflect the borrower’s current</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>address. (This is the case particularly with borrowers who have temporary</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>addresses; when the date to which the temporary address applies passes,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Horizon updates the table so that the current address becomes the borrower’s</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>permanent address.)</td>
</tr>
<tr>
<td>Day End Item and Borrower Counts</td>
<td>DeCount</td>
<td>DeCounts.exe</td>
<td>Updates the changes made to item and borrower related tables. (Horizon</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>keeps a count of changes made to item and borrower tables, such as changes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>to item statuses, collections, btypes, phone types, and so forth.) The</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>DeCounts.exe Day End process updates and records these changes.</td>
</tr>
<tr>
<td>Process</td>
<td>Menu Option</td>
<td>Program Name</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Generate Telephone Messaging Notices</td>
<td>DeTcNtc</td>
<td>DETcNoti.exe</td>
<td>Deletes old telephone notices according to the parameter set in the day_to_keep_history column in the telecirc_control view, and generates telephone notices for overdues, holds, and fines for borrowers.</td>
</tr>
<tr>
<td>Generate Claims for Serials Binding</td>
<td>DeBindC</td>
<td>DeBindCl.exe</td>
<td>Processes all shipped lots that have not been received.</td>
</tr>
<tr>
<td>Statements Completed</td>
<td>DeSTCmp</td>
<td>DeSTComp.exe</td>
<td>Marks Acquisitions statements as complete when the statement is approved and you run Day End.</td>
</tr>
<tr>
<td>Day End Debt Collection Update</td>
<td>DeDebtU</td>
<td>rundc.bat</td>
<td>Queries the database for borrowers you have currently submitted for collections, looks for continued activity for those borrowers, and updates any amounts as a result of continued activity. In addition, it creates a report of these borrowers.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>/d /g1 u e</td>
<td></td>
</tr>
<tr>
<td>Day End Debt Collection New</td>
<td>DeDebtN</td>
<td>rundc.bat</td>
<td>Queries the database for borrowers who meet debt collection criteria that Horizon has not yet submitted for collections, creates a report of these new borrowers, and adds the borrowers to the list of current borrowers submitted for collections.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>/w /g1 n e</td>
<td></td>
</tr>
</tbody>
</table>
Monitoring the Day End Activity Log

Horizon provides a Day End activity log, which lists information about the activity of each Day End process. This information is included on each Day End activity log:

- The name, date, and time of the activity.
- The number of records completed for the activity.
- Any errors that occurred during activity.

Periodically, you should clear the activity log of obsolete activities to make room for new ones. SirsiDynix recommends clearing this log after thirty entries.

This section explains these topics:

- Monitoring the Day End Activity Log
- Clearing an Activity from the Activity Log

To monitor the Day End activity log

1. Open the de_activity view in the Table Editor.
   Horizon displays a Search List window where you can specify the Day End activities you want to view.

2. Search for the type of activity.
   You can search by activity, date, time, program, and so forth. Click Date or Time Range to specify ranges, if necessary.
Horizon displays a list of Day End activities with those activities that fit the index and search string you searched for. This is an example of an activity log for all Day End activities:

![Activity Log Example]

To clear an activity from the activity log

1. Open the de_activity view in the Table Editor.
   Horizon displays a Search List window that lets you search for activities by activity, date, time, and so forth.
2. Choose the Date index.
3. Click Date Range.
   Horizon displays this dialog box:

![Date Range Dialog]

4. Mark a date value: Prior to, Since, or Range.
5. Enter the appropriate date in the “mm/dd/yy” format.
   (For example, if you want to delete all activity performed before February 1, 2001, [02/01/2001], you would mark Prior, then enter the date prior to which you want all activity deleted.)
6 Click OK.
Horizon closes the dialog box and opens the activity list showing only those Day End processes performed before the date you specified. These are the activities you want to delete from the log.

7 Choose Edit, Select All.
Horizon highlights all the activity entries in the list.

8 Choose File, Delete.
Horizon prompts you to verify that you want to delete all the selected records.

9 Click OK.
Horizon deletes the selected activity from the log.
Day End and AdHoc Reports

Horizon compiles statistics while Day End is running and generates reports of those statistics. You print these reports using the AdHoc Report Generator. (For more information, see “Generating AdHoc Statistical Reports” on page 6-32.) You can also configure the categories and subcategories of statistics on these reports.

This section explains these tasks:
- Configuring Statistical Reports
- Generating AdHoc Statistical Reports
- Running the Item Report

Configuring Statistical Reports

Horizon groups statistics on Day End reports into categories and subcategories. These statistical categories and subcategories are system-defined, but you can change how Horizon keeps statistics for each category or subcategory.

For each category or subcategory, you can change these parameters:
- **Statistics category control.** You can control how long statistics are retained, the time unit used for tracking statistics, and how often you want statistics collapsed.
- **Statistics subcategory labels.** You can create or edit labels or headings that appear for subcategories on each report.
- **Statistics print control.** You can determine how often each report is printed, if at all.

This section lists all statistical categories and explains how to configure these parameters for each category.

This section explains these topics:
- A Listing of Statistical Categories
- Changing How Horizon Keeps Statistics for Each Category
- Editing Statistical Subcategory Labels
- Specifying When Day End Prints Reports

A Listing of Statistical Categories

All Horizon statistics are kept by category. Each category keeps different statistical information. There are two types of data on statistical reports: transaction and snapshot data. Transaction data keeps a count of transactions as they occur; snapshot data keeps counts of changes to objects stored in Horizon. This table lists all the statistical categories with their codes and descriptions.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Data Type</th>
<th>Report Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>acqacup</td>
<td>Acquisitions actual cost to unit price ratio.</td>
<td>Transaction</td>
<td>Ave Actual Cost vs. Unit Price</td>
</tr>
<tr>
<td>acqaft</td>
<td>Acquisitions average fill time.</td>
<td>Transaction</td>
<td>Average Fill Time</td>
</tr>
<tr>
<td>acqapf</td>
<td>Acquisitions average percentage fill.</td>
<td>Transaction</td>
<td>Average Percentage Fill</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Data Type</td>
<td>Report Label</td>
</tr>
<tr>
<td>--------</td>
<td>------------------------------------------</td>
<td>-------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>acqclam</td>
<td>Acquisitions number of claims.</td>
<td>Transaction</td>
<td>Claims</td>
</tr>
<tr>
<td>acqav</td>
<td>Acquisitions extended amounts vouched.</td>
<td>Transaction</td>
<td>Line Extended Amounts</td>
</tr>
<tr>
<td>acqecfd</td>
<td>Acquisitions extra charges to dollar product ratio.</td>
<td>Transaction</td>
<td>Extra Charges : Product Dollar</td>
</tr>
<tr>
<td>acqecv</td>
<td>Acquisitions extra charges vouched.</td>
<td>Transaction</td>
<td>Extra Charges</td>
</tr>
<tr>
<td>acqio</td>
<td>Acquisitions items ordered.</td>
<td>Transaction</td>
<td>Items Ordered</td>
</tr>
<tr>
<td>acqir</td>
<td>Acquisitions items received by vendor.</td>
<td>Transaction</td>
<td>Items Rcvd by Vendor</td>
</tr>
<tr>
<td>acqirb</td>
<td>Acquisitions items received by budget.</td>
<td>Transaction</td>
<td>Items Rcvd by Budget</td>
</tr>
<tr>
<td>acqlo</td>
<td>Acquisitions lines ordered.</td>
<td>Transaction</td>
<td>Lines Ordered</td>
</tr>
<tr>
<td>acqlr</td>
<td>Acquisitions lines received.</td>
<td>Transaction</td>
<td>Lines Received</td>
</tr>
<tr>
<td>acqpo ls</td>
<td>PO-line stat.</td>
<td>Transaction</td>
<td>PO-Line Stats</td>
</tr>
<tr>
<td>authdel</td>
<td>Reports the number of Auth records created or deleted.</td>
<td>Transaction</td>
<td>Auth Delta</td>
</tr>
<tr>
<td>bibdel</td>
<td>Reports the number of Bib records created or deleted.</td>
<td>Transaction</td>
<td>Bib Delta</td>
</tr>
<tr>
<td>bordel</td>
<td>Reports the number of Borrower records created or deleted.</td>
<td>Transaction</td>
<td>Borrower Delta</td>
</tr>
<tr>
<td>cki</td>
<td>Reports the total number of checkin transactions.</td>
<td>Transaction</td>
<td>Checkin</td>
</tr>
<tr>
<td>cko</td>
<td>Reports the total number of checkout transactions.</td>
<td>Transaction</td>
<td>Checkout</td>
</tr>
<tr>
<td>crcbs</td>
<td>Circulation--BStat.</td>
<td>Transaction</td>
<td>Circ: BStat</td>
</tr>
<tr>
<td>crcbt</td>
<td>Circulation--BType.</td>
<td>Transaction</td>
<td>Circ: BType</td>
</tr>
<tr>
<td>crcisca</td>
<td>Circulation--IStat by Call#.</td>
<td>Transaction</td>
<td>Circ: Call# IStat</td>
</tr>
<tr>
<td>crcisco</td>
<td>Circulation--IStat by Collection.</td>
<td>Transaction</td>
<td>Circ: Coll. IStat</td>
</tr>
<tr>
<td>crcit</td>
<td>Circulation--IType.</td>
<td>Transaction</td>
<td>Circ: IType</td>
</tr>
<tr>
<td>credit</td>
<td>Circulation fees credited.</td>
<td>Transaction</td>
<td>Moneys Credited</td>
</tr>
<tr>
<td>fee</td>
<td>Circulation fees levied.</td>
<td>Transaction</td>
<td>Moneys Levied</td>
</tr>
<tr>
<td>feewave</td>
<td>Circulation fees waived.</td>
<td>Transaction</td>
<td>Moneys Waived</td>
</tr>
<tr>
<td>hlp</td>
<td>Reports the number of holds placed.</td>
<td>Transaction</td>
<td>Holds Placed</td>
</tr>
</tbody>
</table>
Changing How Horizon Keeps Statistics for Each Category

You can change how Horizon keeps statistics for each category. You can control these features for each statistical category:

- **Retention days.** You can change the number of days you want to retain statistics.
- **Time unit.** You can change the time unit you want used for tracking statistics.
- **Days until Collapse.** You can change the time that elapses before daily statistics are collapsed and how you want them collapsed.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Data Type</th>
<th>Report Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>hlr</td>
<td>Reports the number of holds resolved.</td>
<td>Transaction</td>
<td>Holds Resolved</td>
</tr>
<tr>
<td>ihu</td>
<td>In-house Usage.</td>
<td>Transaction</td>
<td>In-house Use</td>
</tr>
<tr>
<td>ihuisca</td>
<td>In-house Usage--IStat by Call#.</td>
<td>Transaction</td>
<td>In-house: Call# IStat</td>
</tr>
<tr>
<td>ihuisco</td>
<td>In-house Usage--IStat by Collection.</td>
<td>Transaction</td>
<td>In-house: Coll. IStat</td>
</tr>
<tr>
<td>ihuit</td>
<td>In-house Usage--IType.</td>
<td>Transaction</td>
<td>In-house: IType</td>
</tr>
<tr>
<td>itdel</td>
<td>Reports the number of Item records created or deleted.</td>
<td>Transaction</td>
<td>Item Delta</td>
</tr>
<tr>
<td>moncol</td>
<td>Moneys collected.</td>
<td>Transaction</td>
<td>Moneys Collected</td>
</tr>
<tr>
<td>monwav</td>
<td>Moneys waived.</td>
<td>Transaction</td>
<td>Moneys Levied</td>
</tr>
<tr>
<td>monlev</td>
<td>Moneys levied.</td>
<td>Transaction</td>
<td>Moneys Waived</td>
</tr>
<tr>
<td>nbbs</td>
<td># of Borrowers--BStat.</td>
<td>Snapshot</td>
<td>Borrowers: BStat</td>
</tr>
<tr>
<td>nbbt</td>
<td># of Borrowers--BType.</td>
<td>Snapshot</td>
<td>Borrowers: BType</td>
</tr>
<tr>
<td>niisca</td>
<td># of Items--IStat by Call#.</td>
<td>Snapshot</td>
<td>Items: Call# IStat</td>
</tr>
<tr>
<td>niisco</td>
<td># of Items--IStat by Collection</td>
<td>Snapshot</td>
<td>Items: Coll. IStat</td>
</tr>
<tr>
<td>niit</td>
<td># of Items--IType.</td>
<td>Snapshot</td>
<td>Items: IType</td>
</tr>
<tr>
<td>od</td>
<td>Reports the number of overdue items.</td>
<td>Transaction</td>
<td>Overdues</td>
</tr>
<tr>
<td>payment</td>
<td>Moneys collected.</td>
<td>Transaction</td>
<td>Moneys Collected</td>
</tr>
<tr>
<td>refund</td>
<td>Moneys refunded.</td>
<td>Transaction</td>
<td>Moneys Refunded</td>
</tr>
<tr>
<td>rqp</td>
<td>Reports the number of requests placed.</td>
<td>Transaction</td>
<td>Requests Placed</td>
</tr>
<tr>
<td>rqr</td>
<td>Reports the number requests resolved.</td>
<td>Transaction</td>
<td>Requests Resolved</td>
</tr>
</tbody>
</table>
Day End and AdHoc Reports

(For example, if hourly circulation statistics from last month are taking up too much space, you may want to summarize [or collapse] them into the number of items circulated on a certain day of the week or even in the entire month of August.)

- **Report label.** You can change the label you want to appear on each section in this report.

**To change how Horizon keeps statistics for each category**

1. Open the `stat_category` view in the Table Editor.
2. Choose the statistics category you want to change.
   Horizon displays the Edit Stat Category window:

   ![Edit Stat Category Window](image)

   - The Category and Description fields describe the category you are working with. These are display-only fields.

3. Complete these fields:

   ![NOTE](image)
   If you do not want to maintain statistics for a statistical category, enter “0”.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retention Days</td>
<td>Enter the number of days you want statistics retained by Horizon.</td>
</tr>
<tr>
<td></td>
<td>The default setting is 732 days, or two years. All statistics must be kept for at least two years.</td>
</tr>
<tr>
<td>Time Unit</td>
<td>Enter the time unit you want the statistics tracked for.</td>
</tr>
</tbody>
</table>
Editing Statistical Subcategory Labels

Statistical categories are divided into subcategories. (For example, the “checkin” category is divided into the subcategories “normal checkins” and “late checkins.”) You can specify the labels (or headings) that appear for each subcategory on a report.

To edit statistical subcategory labels

1. Open the stat_report view in the Table Editor.
2. Choose the report you want to set up a label for.
   Horizon displays the Edit Stats Report Labels window.
3. In the Report Label field, enter the text you want the report to print for this subcategory.
4. Save your changes.
Specifying When Day End Prints Reports

You can specify how often you want Day End to print a report. You can print reports daily, monthly, or not at all.

To specify when Day End prints reports

1. Open the stat_report_ctl view in the Table Editor.
2. Double-click an existing report.
   Horizon displays Edit Stat Dayend Control window:

   ![Edit Stat Dayend Control](image)
   
   The Report and Description fields describe the category you are working with. These are display-only fields.

3. Specify how often you want to print the report.
4. Enter the string of locations for which the report is printed.
   You can print reports for more than one location by entering a comma but no spaces between each location code. For example:
   “main,bfl,utah,mainres,utahres”
You can also specify that reports for separate locations be printed at the actual locations by entering a semicolon between the location codes:

“main;bfl”

This location string would cause a report for the main location to be printed at the main location, and one for the bfl location to be printed at the bfl location.

Finally, you can combine commas and semicolons to print reports for multiple locations at separate locations:

“main;bfl;utah”

This string would print two reports: one for the main location at the main location and one for statistics at the bfl and utah locations at both locations.

5 Save your changes.

---

**Generating AdHoc Statistical Reports**

The AdHoc Statistical Reports generator lets you generate Day End statistical reports at any time without running the Day End program. You can generate adhoc reports according to:

- Report Type
- Location (This can be one or more locations.)
- Specific Date

After you generate an AdHoc statistical report, you can print the report or save it to a file.

**To generate adhoc statistical reports**

1 Start the *Adhoc Stat Reports* process.

   The default location of this process is the *Administration* folder on the navigation bar. Horizon displays the AdHoc Statistical Report Generator window:

   ![AdHoc Statistical Report Generator](image)

   You can select the report type and locations from the dropdown menus. Once you have made your selections, click **Print**, **Save to File**, or **About**.

2 Highlight the report type you want to generate from the **Report Type** column.
You can highlight only one report at a time. You can choose from these reports:

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| Daily Report                 | **- Circulation Details**  
A daily report of circulation statistics for collection ISTATs, call ISTATs (by call number group), ITYPEs, BSTATs, and BTYPEs.                                                                                                             |
| Daily Report                 | **- Cash Management**  
A report of all cash transactions by fee type for the current day. It also displays current month-and year-to-date totals.  
(For example, if you generated this report for a day in June, Horizon would display the number of cash transactions that occurred on that day by type, as well as the number of transactions for the current month and year.) |
| Daily Report                 | **- Overview**  
A report of all the circulation transactions (checkins and checkouts), requests placed and resolved, holds resolved, overdues, new or deleted database (borrower, bib, auth, and item) records, and acquisitions activities by type for the current day. It also displays totals for the current month- and year-to-date. |
| Monthly Report               | **- Acquisitions Details**  
A report of vendor activity for each vendor, including the number of PO items ordered and received, PO lines ordered and received, average fill time, and number of claims.                                                                                                                                                       |
| Monthly Report               | **- Circulation Details**  
A monthly report of circulation statistics for collection ISTATs, call ISTATs (by call number group), ITYPEs, BSTATs, and BTYPEs.                                                                                                                                                                |
| Monthly Report               | **- Cash Management**  
A report of all cash transactions by fee type for the current and previous months. It also displays totals for the current month of the previous year, and the current and previous years-to-date.  
(For example, if you generated this report for the month of June 2003, Horizon would display the number of cash transactions by type that occurred during June 2003 and May 2003, as well as the number of transactions for June 2003. The report also displays the total number of transactions to date for 2003 and 2002.) |
| Monthly Activity Report      | **- By Day of Week**  
A report of the number of checkins, checkouts, holds placed, and holds resolved by hour for each weekday for the current and previous months. It also displays the daily totals for each weekday.                                                                                                 |
Choose one or more locations for which you want to generate the report from the Locations column.

Enter the date for which you want to generate the report in the Date field.

Do one of these options:
- Click Print. Horizon prints the report.
- Click Save to File. Horizon saves the report to a file.

Press ESC to close the AdHoc Report Generator window.

---

### Running the Item Report

The Item Report is the easiest way to get item-related information out of the database. This report displays information about items, such as collection, status, title, call number, and so forth. You may want to use this report to create a custom shelf list, or a list of all items with a particular characteristic, such as collection or ITYPE. You can save the item report to a file or print the report.

---

### Report Name | Description
--- | ---
Monthly Activity Report - By Hour
| A report of the number of checkins, checkouts, holds placed, and holds resolved by hour for the current and previous months. It also displays the totals for the current month of the previous year, and the current and previous years-to-date. |

Monthly Report - Overview
| A report of the number of circulation transactions (checkins and checkouts), requests placed and resolved, holds resolved, overdues, new or deleted database (borrower, bib, authority, and item records), and acquisitions activities by type for the current and previous months. It also displays the current month’s totals for the previous year and the current and previous years-to-date. |

Monthly Report - Collection Snapshot
| A monthly snapshot report of collection ISTATs and call number ISTATs. |

Monthly Report - Call Number Collection Snapshot
| A monthly snapshot report of collection ISTATs and call numbers ISTATs organized by call number ISTAT. |
To run the Item Report

1. Open the item_report view in the Table Editor.
   Because the Item Report can return a large number of rows, Horizon displays the Search window to help you limit the results.
2. Do one of these options:

<table>
<thead>
<tr>
<th>To restrict only one field</th>
<th>To restrict multiple fields</th>
</tr>
</thead>
</table>
| 1. Choose the index you want to search.  
   If necessary, click Show Codes to see the available codes for the index you chose.  
   For indexes which require a date or time, click Date Range or Time Range to enter a date or time range.  
   2. Enter the restriction in the Search for field.  
   3. Click OK.  
   Horizon displays the report. | 1. Press ESC twice.  
   Horizon closes the Search window.  
   2. Do one of these options:  
      • Choose File, Compound Search.  
      • Press ALT+F2.  
   Horizon displays the Compound Search window.  
   3. Choose the index you want to search.  
   If necessary, click Show Codes to see the available codes for the index you chose.  
   For indexes which require a date or time, click Date Range or Time Range to enter a date or time range.  
   4. Mark the operator you want to use with the index you chose.  
   5. Choose the next index you want to search.  
   6. Mark the operator you want to use with the index you chose.  
   Horizon displays the search string in the Search String field as you chose the indexes and operators you want to use.  
   7. Enter your search criteria in the Search for field.  
   8. If you want to add new search results to the current ones, mark Append List.  
   9. Click Search.  

NOTE
For more information about the Compound Search window, see “Doing a Compound Search” on page 1-19.

Horizon displays the Item Report based on the search criteria you entered.
Getting Help

Occasionally, you will run into problems while using Horizon. This section provides information about how to get help for Horizon problems. In addition, this section explains an error message you may encounter while working in Horizon and how to resolve that error.

This section describes these tasks:

- Reporting a Problem
- Running Debug Logging
- Troubleshooting Horizon and Information Portal Database Failures
- Troubleshooting Connection Errors
- Debugging the Horizon Database
- Error Message

Reporting a Problem

Here are some guidelines on how to report a problem to SirsiDynix Customer Support staff:

- Be specific about which task you are having a problem with. If you have run Debug logging and have a report on the process, have that report available when you talk to SirsiDynix Customer Support staff.
- Indicate whether the process failed at the start, or appeared to start before malfunctioning or showing an error message.
- If an error message is displayed, include the full text of the error message and note what you were doing when it appeared.
  You may want to use your Print Screen key, or use a screen capture program to document the error message.
- Before calling SirsiDynix Customer Support, check the documentation related to the task you were doing for instructions on resolving the problem.

Running Debug Logging

Occasionally, SirsiDynix Customer Support staff may ask you to run the Debug program to help them troubleshoot problems. Debug is a diagnostic and reporting tool used to report problems with individual processes. While you run the Debug program, Horizon tracks everything that happens in Horizon until you stop the program. This detailed information is stored in a separate file in your Horizon directory.

IMPORTANT

You are strongly discouraged from running Debug logging for extended periods of time. On workstations with heavy Horizon activity and limited free disk space, the log generated by Debug can use up the free space if it is left to run unattended for a long period of time. This is primarily a concern on workstations where Horizon is never, or rarely, shut down.
There are two ways you can run Debug logging: you can run it from within Horizon, or you can run it from a command-line window.

If you want to capture the login process as part of your Debug output, you must start Debug from a command line.

NOTE

Unlike an earlier Debug program (which used system variables), when you close Horizon, the Debug program stops, and will not automatically restart when you restart Horizon.

This section explains these topics:

- Running Debug Logging from the Horizon Launcher
- Running Debug Logging from the Command Line

To run Debug from the Launcher

1. Log in to Horizon.
2. Access the point in Horizon where you want to begin logging information.
3. Press **CTRL+ALT+SHIFT+D**.
   Horizon displays the HzDebug window:

   ![HzDebug Window](image)

4. Choose any number of these **Debug Options** to configure the information in your reports:

<table>
<thead>
<tr>
<th>Choose this option</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>DbComment</td>
<td>Capture general notes that have been inserted into the code to assist in troubleshooting.</td>
</tr>
<tr>
<td>DbCommand</td>
<td>Capture the client machine’s instructions and queries to the database.</td>
</tr>
</tbody>
</table>
5 Choose any number of **Output Options** to configure how the information in your reports is output:

<table>
<thead>
<tr>
<th>Choose this option</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>DbResult</td>
<td>Capture the database’s response to the client machine’s instruction and queries.</td>
</tr>
<tr>
<td>DbTime</td>
<td>Insert timestamps on the activity that Debug adds to the log. This is useful when the problem occurs during off hours, or if you suspect a problem is occurring, but it does not manifest itself until some time later.</td>
</tr>
</tbody>
</table>

### At this field

<table>
<thead>
<tr>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Create Log File</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

**WARNING**

If you save the file to your Horizon directory, make sure you do not choose a filename that is the same as any of the Horizon files. Use .dmp as your file extension, not .exe or .dll.

| **Append** | If you want to append the collected data to a pre-existing log file, mark this box. |

**NOTE**

If you use the same debug log filename over and over, you will overwrite the file unless this box is checked.
Getting Help

6  Note the path and name of the debug file. This is the file you will send to SirsiDynix Customer Support staff.

7  Click Start.

8  Run the process for which you want to log information.

9  When you are ready to stop recording the debug log, press CTRL+ALT+SHIFT+D.

10  Click Stop.

11  If directed, send the Debug file to SirsiDynix Customer Support staff.

To run Debug from the command line

1  Open a command-line window.

2  Enter the path and filename for the Horizon Launcher application, followed by the “/t” switch, in this format:
   Drive:\Horizondirectory\Launcher.exe /t
   For example, enter this:
   C:\Horizon73\Launcher.exe /t
   Horizon opens the Launcher, with the Debug program running. Debug directs the output from the login and subsequent activity to an output file named “Sunrise.dmp” in your Horizon directory. The program records data to this log until you choose to stop recording.

3  When you are ready to stop recording the debug log, press CTRL+ALT+SHIFT+D, then click Stop.

4  If directed, send the Debug file to SirsiDynix Customer Support staff.

Troubleshooting Horizon and Information Portal Database Failures

You may store your Horizon and Information Portal databases in many different ways. (For example, the Information Portal database may be on the same server as the Horizon database. Or, your databases may straddle 2 servers or even straddle two types of RDBMS [Horizon on Sybase and Information Portal on MS SQL]).

Given that you are running two live databases side-by-side (and possible three databases with Community Resources), you may want to know what to do if either the Horizon database or the Information Portal database becomes corrupted and needs to be restored.
This section describes different scenarios in which you may have database problems and some recommendations on how to minimize the effects of these problems.

**Horizon Database Fails but Information Portal Database Is Fine**

If you have a situation where the Horizon database fails, the Information Portal database is fine, and you can restore only last night’s or older backup, here are some effects:

- The Information Portal database will be out of sync with Horizon. Information Portal will have missing data because some preference settings made by users are saved on the Horizon database. (For example, e-mail notification of newly acquired items for an authority would be lost because it is stored on the Horizon database.)
- Any requests placed or deleted during the time missing in the database backup will no longer exist.
- Information Portal may attempt to get data for an item that was indexed, but no longer exists in the restored backup.
- The further that you need to go back in time for a Horizon database backup, the more My List information, as well as any of the previously listed information, will be missing from Information Portal.

**Recommendation**

1. Restore the most recently dated Horizon backup that you can.
2. Reindex to help eliminate a few discrepancies.

**Information Portal Database Fails but Horizon Database Is Fine**

If you have a situation where the Information Portal database fails but the Horizon database is fine and you can restore only last night’s or older backup, here are some effects:

- The further that you need to go back in time for an Information Portal database backup, the more My List information, as well as other information, will be missing from Information Portal.

**Recommendation**

1. Restore the most recently dated Information Portal backup that you can.
2. Reindex to help eliminate a few discrepancies.

**IMPORTANT**

SirsiDynix strongly recommends that you reindex.

**Both Horizon and Information Portal Databases Fail**

If you have a situation where both the Horizon and Information Portal databases fail and you can restore the backups that occurred at the same time, here are some effects:

- The further that you need to go back in time for each database backup, the more information will be missing from Horizon and Information Portal.

**Recommendation**

1. Restore the most recently dated Horizon and Information Portal backup that you can.
Troubleshooting Connection Errors

This table explains how to understand and fix connection errors that may display when Horizon startup is starting the Application Server connection.

<table>
<thead>
<tr>
<th>Error message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The middle-tier Horizon database connection cannot be determined. Please check the matham data source.</td>
<td>You have not entered any value in the Horizon App Server Data Source field in the matham view, or the corresponding target on Information Portal cannot be found. The user will not be able to access the middle-tier. Your system administrator must make sure that the data source name entered in the Horizon App Server Data Source field in the matham view matches the data source name in your Horizon connection settings in Information Portal. (For more information, see “Changing the Data Source Connection for Horizon” section in the “Searching Setup” chapter of the Horizon Information Portal System Administration Guide. Once the data source is filled in or changed, the user will need to restart Horizon.</td>
</tr>
<tr>
<td>The middle-tier data source connects to a different database. Please correct the matham data source.</td>
<td>The Information Portal data source referenced in the matham table connects to a different database. This could occur if a database has been restored under a different name without updating the data source name on matham. The user will not be able to access the middle-tier. Your system administrator must update matham with the correct Information Portal data source name. Once the data source is filled in or changed, the user will need to restart Horizon.</td>
</tr>
</tbody>
</table>

Debugging the Horizon Database

If you need to debug Day End, Adhoc reports, or the Launcher start up, you can do so using this procedure. The output from this debug is in SQL, so you can decipher the output if you know SQL. Including portions of the output in your problem logs to customer support can be helpful. This procedure is useful for finishing and correcting database problems, not data problems.

NOTE

You may want to periodically find and delete debug logs as regular system maintenance.

To debug the Horizon database

1. Unless you are debugging the Horizon launcher.exe, you must establish the connection to the server by starting Horizon.
2. At a DOS command line, enter this command:
   set hzdebug=dbcommand, dbtime, dbcomment

3. Enter the location and file name of the debug log file.
   For example, enter this command:
   set hzoutput=c:\horizon74\bug.out

4. Enter the program name and any arguments needed to launch the program.
   For example, enter any of these commands:

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>deoverdu</td>
<td>Starts Day End Overdues.</td>
</tr>
<tr>
<td>denotice</td>
<td>Starts Day End Notices.</td>
</tr>
<tr>
<td>destat</td>
<td>Starts the Day End daily statistics processing.</td>
</tr>
<tr>
<td>destat</td>
<td>Starts the Day End monthly statistics processing.</td>
</tr>
<tr>
<td>adhoc</td>
<td>Starts the Adhoc reports.</td>
</tr>
</tbody>
</table>

**NOTE**

You can enter this command to display the hzoutput variable's current setting:

   set hzoutput

Possible problem: The command returns the variable's current setting:

   set hzoutput = xxxxx

Note that there is a space on the left side of the “=” DOS interprets this as set hzouput.

You can enter this command to release (or turn off) the variable:

   Set hzoutput

Possible problem: This command returns nothing and “set hzoutput” is not set.

   Set hzoutput = xxxxx

Note that there is only one space on the right side of the “=”. DOS interprets this as “set hzoutput=” and deletes the variable.

To turn off debugging

1. At a DOS command line, log in to your Horizon database.

2. Enter this command:
   set hzdebug=

3. Enter this command, or close the DOS window:
   set hzoutput=
**Error Message**

This section explains an error message you may encounter while working in Horizon and how to resolve that error. This section will include additional error messages in future releases. (For information on error messages that display in Acquisitions, see “Error Messages” in the Acquisitions Setup Guide.)

**Error: Unable to allocate shared memory**

This error generally occurs while attempting to run multiple instances of Horizon Launcher, PUI Launcher, or other Horizon applications against different databases. This error indicates that the shared memory allocated to Horizon is insufficient to run all the applications at once.

**Solution**

You fix this problem by increasing the shared memory allocated to Horizon. By default, Horizon allocates 4MB (or 4096K) for shared memory. However, you can override this default by adding an environment variable named “HzShrMem” and setting its value to some other size (in kilobytes).

You add or change environment variables for a workstation in the System Properties settings. The steps below explain how to do this on Windows XP. These steps may vary if you are running a different version of Windows. If you are running Windows 95/98/ME, you must reboot before your changes will take effect.

**To increase shared memory allocated to Horizon**

1. On the workstation where the error is occurring, close all Horizon applications.

   **IMPORTANT**

   Changes to the shared memory setting will not take effect if any Horizon processes are still running. Use the Windows Task Manager to verify that all Horizon processes are closed, or restart Windows.

2. Click Start and choose My Computer.

3. Under System Tasks, choose View system information to display the System Properties window.

   (To access this window in earlier versions of Windows, right-click on the My Computer icon on the desktop and choose Properties.)

4. Click the Advanced tab.

5. Click Environment Variables to display the Environment Variables window.

6. Under System Variables, click New to display the New System Variable window.

7. In the Variable name field, enter “HzShrMem”. 
8 In the **Variable value** field, enter the amount of memory, in kilobytes, you want to allocate for Horizon shared memory.

(For example, you might enter “8192”, which is double the size of the default shared memory amount. Note that entering an amount that is too high could adversely affect system performance.)

9 Click **OK** three times to save your changes and exit System Properties.
Introduction to Horizon Views

This chapter explains Horizon views including displaying list and edit views, reconfiguring views, adding columns and groups to views, and creating alternate views.

- **About Introduction to Horizon Views** 7-3
- **Types of Views** 7-4
- **Understanding the Reconfiguring Process** 7-5
- **Finding and Opening the Correct View** 7-6
- **Reconfiguring List and Edit Windows** 7-9
- **Adding a Group to a View** 7-38
- **Working with Alternate Views** 7-41
About Introduction to Horizon Views

While working in Horizon, you open windows or displays that show data from the database. These windows are called “views.” A view is a graphical representation of the tables and their data. (For example, the Titles List window is a view of the bib table. The Item window in Cataloging is a view of the item table. The Borrower window is a view of the borrower table, and so forth.)

Views in Horizon appear in one of two forms: a list view or an edit view. A list view displays rows in a table; an edit view displays the columns of a single row in the table. One view controls both the list and edit views.

This diagram illustrates the relationship between the view, the list window, and the edit window. In this example, the borrower view controls both the List Borrower window and the Edit Borrower window:

Figure 7.1: Relationship between Views and Windows

A view determines the “look and feel” of a window on Horizon, including these elements:

- What information from the table’s columns appears on the display.
- Where each item of information appears on the window.
- Default data in a record.
- The type of field, such as radio button, coded entry field, and check box.
- The number of characters displayed from the table column.
- The proximity of the field in relation to the others.
- The labels for each field.

This chapter explains the types of views in Horizon and the reconfiguring process. It also shows you how find and open views, and reconfigure the views so that windows display additional information suited to your library’s needs. (For example, you can add groups to a view, or change a window’s title and columns.)

This chapter explains these topics:

- Types of Views
• Understanding the Reconfiguring Process
• Finding and Opening the Correct View
• Reconfiguring List and Edit Windows
• Adding a Group to a View
• Working with Alternate Views

Types of Views

Horizon uses three types of views. Each type of view can affect either the list window, the edit window, or both. Horizon uses these types of views:

• **Search views.** Search views reconfigure search windows. They differ slightly from other Horizon views because search windows are all list windows and are display-only. While you can access the view for a search window in the Table Editor, you cannot access the window itself in the Table Editor.

  **NOTE**
  The Reserve Request window, which can be opened in staff searching, is an exception in that it does record information—it is not simply a display window. For this reason, its corresponding view is considered a Program Only View.

• **Program-only views.** Program-only views reconfigure windows that appear in Horizon processes other than the New Search and Table Editor processes. (For example, the views that modify the CKI window in Circulation, the Edit Items window in Cataloging, and the PO window in Acquisitions are all program-only views.) While you can access program-only views in the Table Editor, you cannot display the views controlled by program-only views in the Table Editor.

• **General or Table Editor views.** General or Table Editor views reconfigure the tables in the Table Editor and their corresponding edit windows. Some Table Editor tables, such as Code Lookup lists, can be opened from other processes in Horizon; however, since these lists are actually tables, their corresponding views are Table Editor views.
Understanding the Reconfiguring Process

Most Horizon windows can be changed, to some degree, by reconfiguring the view. Reconfiguring views is a complex process that involves many steps. However, the process can be represented by eight general steps. This flowchart shows these steps and how they relate to each other:

Before you reconfigure your current views, you must first decide which information you want to display and how you want it to display.

**NOTE**

If you are reconfiguring a search view, you must also decide which flavors should show which views.

When you finish reconfiguring the view, you must save your changes and exit Horizon. Then, you can log back in to view your changes.
Finding and Opening the Correct View

One of the challenging aspects of reconfiguring windows is knowing which view controls which window. This section explains two ways to find the view that you need:

- Finding a View by Changing the List View Display
- Finding a View Using the Search Command

Before you can complete other tasks in this chapter, such as reconfiguring list and edit windows, you need to be able to find and open the view for a list or edit window.

For a list of views and the windows each view configures, see “Horizon Views and the Windows They Configure” on page A-3. For additional information, see the Table Structures Guide.

Finding a View by Changing the List View Display

The Display function on the List Horizon View window lets you temporarily control what data is listed for each view. The List Horizon View window displays a set of default columns that display for each view. (For example, Horizon can display a description of each view, the table each view is built on, the title of the window that a view creates, and so forth. You can then sort the list by one of the displayed fields and quickly locate the view that you need.)

Since each view refers to a unique window, displaying the window title associated with each view is a useful method for finding the one that you need.

To find a view by changing the list view display

1. Open the mq_view (Horizon View Definitions) view in the Table Editor.
   Horizon opens the List Search window with a list of the indexes or fields that you can narrow the list by.
2. Click Cancel to close the List Search window and display all the views.
3. Click OK.
   Horizon displays the List Horizon View window.
4. Click Display.
The Display Options dialog box opens, in which you can temporarily redefine list window displays for your workstation:

5 Highlight the **Window Title** column.
6 Highlight any other columns that you want to display.
   Do not highlight columns that you do not want to display.
7 Click **OK**.
   Horizon now shows each view’s corresponding window title in the List View window, as well as the other columns you selected.
8 Click **Sort**.
9 Highlight **Window Title** as the primary sort column.
10 Click **OK**.
   The List View window displays the views alphabetically by their window titles.
11 Double-click the view that you want to open.
   Horizon displays the Edit Horizon View window.
Finding a View Using the Search Command

You can use the search command to restrict the List Horizon View window to certain views.

To find a view using the search command

1. Do one of these options:
   - Open the *mq_view* (Horizon View Definitions) view in the Table Editor.
   - If the List Horizon View window is already open, press **CTRL+F2**.
   Horizon displays the List Horizon View window overlaid by the Search window with a list of the indexes or fields that you can narrow the list by:

2. Conduct a search for the index you want.
   (For example, to display a list of all views that control borrower information, such as the Edit Borrower window and the List Borrowers window, you would enter "borr*" in the Search for field. For more information, see “Using the List Search Window” on page 1-16.)

   **NOTE**
   If you truncate a search term, enter the truncation character before and after the term.

3. Click **OK**.
   Horizon displays the List Horizon View window with a list of views that matches the search criteria.

4. Double-click the view that you want to open.
   Horizon displays the Edit Horizon View window.
Reconfiguring List and Edit Windows

You can reconfigure Horizon views so that windows display additional information that is suited to your library’s needs. When you reconfigure views, some view properties can be changed for either a list window or an edit window. Other view properties can be changed only for a list window, or only for an edit window.

This chapter explains all of the properties that you can set up for a Horizon view. It also explains how to change specific properties for a view, such as adding a column to a window, or changing the width and label of a column.

This section explains these topics:

- Setting Up a Horizon View
- Adding a Column to a Search List View or Edit Window
- Changing the Display of Columns or Fields in List and Edit Windows
- Changing List Windows
- Changing Edit Windows

Setting Up a Horizon View

You can set up a Horizon view by changing various properties. (For example, you can specify general properties, such as the title that displays on the window’s title bar. You can specify list properties, such as the order in which columns display on list windows.)

NOTE

This section gives an overview of all the properties that control list and edit windows. (For more information on how to use these properties to change list and edit windows, see the other sections in this chapter.)

IMPORTANT

Some properties are system-created and must not change them. This section explains which properties you must not change.

When you set up a view, you choose a specific view on the List Horizon View window. Then, Horizon displays the corresponding Edit Horizon View window for the view. The Edit Horizon View window is where you set up a Horizon view.

This section explains these topics:

- Specifying General Properties
- Specifying List Properties
- Specifying Edit Properties
- Specifying Edit Link Properties
- Specifying Column Types
- Specifying Column Values
Specifying General Properties

You can specify general properties for a view such as the description of the view, and the table it is based on.

To specify general properties

1. Open the view for the window that you want to reconfigure.
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

2. Choose the view that you want to edit, or create a new view.
   Horizon displays an Edit Horizon View window:

   As a precaution, click **Save** to save your changes before you go to the next page of the window.

   Clicking **Page Down** displays the next page of the window. (Because you can resize windows, the fields in your windows may not display on the same pages as the sample windows shown in this guide.)

3. Complete these fields as necessary:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mq view</td>
<td>This field identifies the view.</td>
</tr>
<tr>
<td></td>
<td>Do not change this name; it is system-created.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the view. This description can help identify the view if displayed in the list view window.</td>
</tr>
<tr>
<td>View Type</td>
<td>This field specifies the type of view and determines how it can be configured. Do not change the view type.</td>
</tr>
<tr>
<td><strong>In this field</strong></td>
<td><strong>Do this</strong></td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Table Name</td>
<td>Enter the name of the table that the view is based on. The table determines the columns that contain information displayed in the window using the view.</td>
</tr>
<tr>
<td>Window Title</td>
<td>Enter the title that appears on the window’s title bar. Use this field to change the title of the window based on the view.</td>
</tr>
<tr>
<td>Help Panel ID</td>
<td>Do not change the information in this field.</td>
</tr>
<tr>
<td>Properties</td>
<td>This field specifies general parameters about the view. and is grouped into two categories.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Search Properties.</strong> Choose one or more of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Slice.</strong> This option determines if a search view is an alphabetical browse list or a closed list. If this check box is marked, the view displays a closed list. Do not change this field for an existing view.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Xrefs.</strong> Mark this option if you want See and See Also references to display in staff searching.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Command Properties.</strong> Choose one or more of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Can Edit.</strong> Lets you edit a view.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Can Add.</strong> Lets you add to a view.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Can Copy.</strong> Lets you copy a view.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Can Delete.</strong> Lets you delete a view.</td>
</tr>
<tr>
<td></td>
<td>When you choose any of these options, Horizon enables the corresponding menu commands and button commands.</td>
</tr>
<tr>
<td>Secured</td>
<td>Mark this box to secure this window from public view.</td>
</tr>
</tbody>
</table>
4 Click **Page Down** or resize the window to display the **Columns: ‘ord’** field:

5 Complete these fields as necessary:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Columns: ‘ord’</td>
<td>This field displays the ordinal number of the column. Do not change the number in this field; the system uses this number to maintain the uniqueness of the view.</td>
</tr>
<tr>
<td>Creation Date</td>
<td>Enter the name of the column where the creation date of new rows in the table is stored.</td>
</tr>
<tr>
<td>Update Date</td>
<td>Enter the name of the column where the update date of new rows in the table is stored.</td>
</tr>
<tr>
<td>Base Table Name</td>
<td>Enter the name of the base table if the view is created from a SQL view.</td>
</tr>
</tbody>
</table>

6 Save your changes.

7 Do one of these options:

- If you want to change additional properties for the view, continue with “Specifying List Properties” on page 7-13.
- If you are finished changing view properties, exit Horizon and log back in to view your changes.
Specifying List Properties

List windows in Horizon contain a list of records. This List Items window in Cataloging is an example of a list window:

![List Items for Bib 150](image)

You can change the display of a list window by specifying list properties.

**To specify list properties**

1. Open the view for the window that you want to reconfigure.
   
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

2. Choose the view that you want to edit, or create a new view.
   
   Horizon displays an Edit Horizon View window.

3. Click **Page Down** or resize the window to display the **List View** group:

   ![Edit: Horizon View](image)
Complete these fields as necessary:

<table>
<thead>
<tr>
<th>In this field in the List View group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column Name</td>
<td>This field specifies the name of the database column on which the list window is based. Horizon defines this name; do not change it.</td>
</tr>
<tr>
<td>Ord</td>
<td>This field lets you change the order in which columns display. It displays the numerical order that columns display, usually from left to right of the columns in the list (except on the Bibliographic Detail window, which displays columns from top to bottom). Enter the order number for the column. (For example, the column farthest to the left of a list would be “Ord 0”, the column immediately to its right would be “Ord 1”, and so on.)</td>
</tr>
<tr>
<td>Column Label</td>
<td>Enter the name of the list window column that you are editing. The column name is defined by your library and is the column name that the user sees on a window.</td>
</tr>
<tr>
<td>No. of Display Characters</td>
<td>Enter the number of characters that the column can display. You can specify up to 255 characters. Horizon displays approximately 55 characters per line with a maximum of five lines. If information in a column on a list window appears cut off or incomplete, it is because the number of display characters is too small to allow all the information to be displayed.</td>
</tr>
<tr>
<td>Pad Character</td>
<td>This field specifies what is displayed in addition to the actual information in a column. For example, the zeros to the left of the right-justified tag number shown here are pad characters: Figure 7.3: Pad Characters in a Tag Number</td>
</tr>
</tbody>
</table>

![Figure 7.3: Pad Characters in a Tag Number](image)
<table>
<thead>
<tr>
<th>In this field in the List View group</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Properties                           | This field specifies how much of the column information is displayed. Choose one or more of these options:  
  - **Displayed.** Determines whether the column is displayed. (For more information, see “Hiding or Displaying a Column in a List” on page 7-33.)  
  - **Code Translate.** Determines whether the coded entry displays in short or long form. (For example, the List Items window might display each item’s item type, which is a coded field.) The short form is the code for that column; the long form is the description for that column.  
  - **Show Long Value.** Determines if radio button entries display in a long or a short form.  
  - **Right Justify.** Right-justifies the information when it displays.  
  - **Displayed on Code List.** Lets you display the code list differently than the Table Editor list. Some lists in the Table Editor are also Code lists. Marking this box displays the column in the Code list (but not necessarily in the Table Editor list).  
  - **Not Searchable.** Specifies whether or not this column is searchable. |
| MARC Map                             | If the column you are adding comes from a bib or authority record, this field provides space for entering the MARC map that points to the tags and subfields that contain the information displayed in the column. This field works for search and RBR title list windows. Enter or choose the code for a MARC map. (For more information, see “MARC Maps” on page 2-93 and “Specifying What MARC Information Is Displayed in Search and Reserve Bookroom (RBR) List Windows” on page 7-34.”) |
| Sort Processor                      | Enter or choose the code for a sort processor. (For more information, see “Choosing How Columns Sort Data” on page 7-35.) |

5  Save your changes.  
6  Do one of these options:  
  - If you want to change additional properties for the view, continue with “Specifying Edit Properties” on page 7-16.  
  - If you are finished changing view properties, exit Horizon and log back in to view your changes.
Specifying Edit Properties

Edit windows display one row from a list on a list window. This Edit Items for Bib 150 window is an example of an edit window:

![Edit Items for Bib 150 window]

You can change the display of an edit window by specifying edit properties for each field that displays in the window.

To specify edit properties

1. Open the view for the window that you want to reconfigure.
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

2. Choose the view that you want to edit, or create a new view.
   Horizon displays an Edit Horizon View window.

3. Click Page Down or resize the window to display the Edit View group:

   ![Edit Horizon View window]

   Click New to create a new field to display on the edit window.
Complete these fields as necessary:

<table>
<thead>
<tr>
<th>In this field in the Edit View group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column Name</td>
<td>This field specifies the name of the database column on which the field in the edit window is based. Horizon defines this name; do not change it.</td>
</tr>
<tr>
<td>Ord</td>
<td>Enter the order number in which the field appears on edit windows. (For example, the field appearing first on the edit window would be “Ord 0”, the field immediately below would be “Ord 1”, and so on.)</td>
</tr>
<tr>
<td>Column Label</td>
<td>Enter the name of the edit window field that you are editing. The column label is defined by your library and is the field name that the user sees on a window.</td>
</tr>
<tr>
<td>No. of Display Characters</td>
<td>Enter the number of characters that the field can display. This controls the length of the field. You can specify up to 255 characters. Horizon displays approximately 55 characters per line with a maximum of five lines. If information in a field in an edit window appears cut off or incomplete, it is because the number of display characters is too small to allow all the information to be displayed.</td>
</tr>
<tr>
<td>Help Panel ID</td>
<td>Do not change the information in this field.</td>
</tr>
<tr>
<td>Default Value</td>
<td>Enter the default data for a field. Users may enter the same data in some fields for almost every record of a given type. (For example, all borrower records may have the same location code entered.) To save time, you can specify common data, referred to as default data, in the view that controls the records. Users can edit default data as needed in individual records.</td>
</tr>
<tr>
<td>Enable [Save]</td>
<td>Mark this box to enable the Save button. That way, users can save changes made in the edit window.</td>
</tr>
</tbody>
</table>
### Chapter 7: Introduction to Horizon Views

<table>
<thead>
<tr>
<th>In this field in the Edit View group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit Prop</strong></td>
<td>This field controls how the record is edited. Choose one or more of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Editable.</strong> Displays a text box next to the field, which lets users record information. Fields on an edit window can be editable or display-only. In the example of the Edit Items window, the Item Type field has been flagged as editable, but the item# field has not.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Required.</strong> Flags a field as required. Some fields must have information recorded in them either for Horizon to function or because your library requires it.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Empty on Copy.</strong> Removes the information in this field in a copy of another record.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Batch Change.</strong> Lets users create the records simultaneously and edit the same field for a selected group of records simultaneously. (For example, catalogers can create many item records for the same title. Some of these item records may be housed at a different location. Rather than having to open each record and enter the different location, users can multiselect the items and change the location as a batch.)</td>
</tr>
<tr>
<td><strong>Display Prop</strong></td>
<td>This field controls how a field appears. Choose one or more of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Check Box Under.</strong> Displays a check box under a field. Check boxes appear to the left of fields by default. (An example is the Display Properties fields shown on page 7-16, which all have check boxes under the field names.)</td>
</tr>
<tr>
<td></td>
<td>• <strong>Adjacent to Previous.</strong> Displays a field to the right of a previous field. Fields appear under one another by default on a window.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Radio Long Values.</strong> Displays a radio button next to the field. “Long values” refers to the language for the radio button. Fields can have radio buttons to the left of them.</td>
</tr>
<tr>
<td><strong>Code Mq View</strong></td>
<td>Enter or choose a code that links one record to another. Some fields need to be coded to connect the record to other records. (For example, the item record needs to have the coded fields Location and Collection to link the item to the appropriate controls in a location record and a collection record.) To specify what code list should appear when users choose the Codes button for a field, enter the appropriate index.</td>
</tr>
</tbody>
</table>
Reconfiguring List and Edit Windows

In this field in the Edit View group | Do this
--- | ---
MARC Map | If the field that you are adding comes from a bib or authority record, this field provides space for entering the MARC map that points to the tags and subfields that contain the information displayed in the field. This field works for search and RBR title list windows.
Enter or choose the code for a MARC map.
(For more information, see “MARC Maps” on page 2-93 and “Specifying What MARC Information Is Displayed in Search and Reserve Bookroom (RBR) List Windows” on page 7-34.)

5  Save your changes.
6  Do one of these options:
   • If you want to change additional properties for the view, continue with “Specifying Edit Link Properties” on page 7-19.
   • If you are finished changing view properties, exit Horizon and log back in to view your changes.

Specifying Edit Link Properties

You can link another table to a view (creating a group in the view) by specifying edit link properties. (For more information on groups, see “Adding a Group to a View” on page 7-38.)

To specify edit link properties

1  Open the view for the window that you want to reconfigure.
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

2  Choose the view that you want to edit, or create a new view.
   Horizon displays an Edit Horizon View window.
3 Click **Page Down** or resize the window to display the **Edit Links** group:

Click New to create a new group to display on the edit window.

4 Complete these fields as necessary:

<table>
<thead>
<tr>
<th>In this field in the Edit Links group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ed. Order</td>
<td>Enter the number for the order or position of the group in relation to the other fields. This should be a unique number.</td>
</tr>
<tr>
<td>Linked View</td>
<td>Enter or choose the code for the view that controls the display of the information that appears in the group. (For example, if you want to add a group for phone numbers to the Edit Borrower window, the linked view would be borrower_phone.)</td>
</tr>
<tr>
<td>Label</td>
<td>Enter the label that appears at the upper-left corner of the group.</td>
</tr>
<tr>
<td>Link Column(s)</td>
<td>Enter the column that the linked view has in common with the view you are working with. (For example, if you are linking the borrower_phone view to the borrower view, the link column would be borrower#.)</td>
</tr>
</tbody>
</table>
Reconfiguring List and Edit Windows

In this field in the Edit Links group | Do this
---|---
Key Dependency | This field determines how much the main table depends on the information stored in the linked table. Choose one of these options:
• Fully Dependent on Superordinate Table.
• Partially Dependent.
• Totally Independent.
Min Required | Enter the number of required group entries that users must enter in the group. (For example, to require two address entries in the Address group on the location table, you enter “2” in the Min Required field on the Edit Links group for the Address group entry on the Location table.)

5 Save your changes.

6 Do one of these options:
• If you want to change additional properties for the view, continue with “Specifying Column Types” on page 7-21.
• If you are finished changing view properties, exit Horizon and log back in to view your changes.

Specifying Column Types

You can specify the types of columns in the table.

**NOTE**

When reconfiguring existing views, you will seldom need to change the column types.

To specify column types

1 Open the view for the window that you want to reconfigure. (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

2 Choose the view that you want to edit, or create a new view. Horizon displays an Edit Horizon View window.
3 Click **Page Down** or resize the window to display the **Column Types** group:

![Edit: Horizon View](image)

4 Complete these fields as necessary:

<table>
<thead>
<tr>
<th>In this field in the Column Types group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table</td>
<td>Enter the name of the SQL table for the column.</td>
</tr>
</tbody>
</table>
| Column                                 | Enter the name of the SQL column whose data type you are defining.  
  **NOTE**  
  If you are creating this column using the data type "Sort-Wt", enter “original” as the column name. |
In this field in the Column Types group | Do this
---|---
**Data Type** | Choose one of these options:

- **Reconst.** (Reconstituted) Mark this option if data in this column is modified for sorting purposes and must be processed by Horizon when displayed.

- **Code.** Mark this option if data in this column is a code that Horizon uses to identify valid entries and descriptions.

- **Mq Value.** Mark this option if data in this column is a list of values (integers) and descriptions that are displayed as radio buttons.

- **Date.** Mark this option if data in this column represents a date. Dates are Julian date or number of days since 1 January 1970. You control the date format through each PC’s OS setup/country National Language Setting (NLS) icon.

- **Time.** Mark this option if data in this column represents time. Times are represented as minutes since midnight. You control the 12/24 hour style and format through each PC’s OS setup/country National Language Setting (NLS) icon.

- **Currency.** Mark this option if data in this column is stored without a decimal (for example, $12.81 is stored as 1281).

- **Money.** Mark this option if data in this column is stored in dollars and cents with a decimal.

- **Boolean.** Mark this option if data in this column uses a binary yes/no value. When Boolean column types are editable, they appear as check boxes; when display-only, they appear as “Yes,” or “No.”

- **Key String.** Mark this option if data in this column is an alphanumeric string, such as barcodes.

- **Month/Day.** Mark this option if data in this column uses the date in form of mm/dd (four integers, no year). This is most commonly used in Serials for prediction patterns. You control the date format through each PC’s OS setup/country National Language Setting (NLS) icon.

- **Multilingual.** Mark this option if data in this column marks plain text as “multilingual” so that Horizon puts it through a translation routine if you are using Horizon in a non-English environment.
<table>
<thead>
<tr>
<th>In this field in the Column Types group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Data Type (continued)</strong></td>
<td>Choose one of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Call.</strong> Mark this option if the call number data in the column is stored differently from the way it should display and must, therefore, be processed before displayed.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Sort-Wt.</strong> Mark this option if data in this column has a numerical value that determines the sort order for linguistic characters used in Unicode.</td>
</tr>
<tr>
<td><strong>Reconst/Sw</strong></td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you chose the data type Reconst, enter the name of the column which contains the reconstituted data. (Usually this column is called reconstr” or is the name of the column to be reconstituted plus “_reconst”.)</td>
</tr>
<tr>
<td></td>
<td>• If you chose the data type Sort-Wt, enter the name of the Sort Weight field in the table. (If you use the default script, enter “sort_weight”.)</td>
</tr>
<tr>
<td><strong>ALA Translate</strong></td>
<td>Mark this box if the column is a reconstituted form which may contain ALA characters.</td>
</tr>
<tr>
<td></td>
<td>If you leave this box empty, ALA characters codes will not display correctly.</td>
</tr>
<tr>
<td><strong>Code: Table</strong></td>
<td>If you chose the data type Code, enter the name of the table that the code refers to.</td>
</tr>
<tr>
<td></td>
<td>(For example, if the code is location on the item table, the table to verify the code again is location.)</td>
</tr>
<tr>
<td><strong>Key</strong></td>
<td>If you chose the data type Code, enter the column that contains the code you actually use in the column whose characteristics you are defining.</td>
</tr>
<tr>
<td><strong>Descr.</strong></td>
<td>If you chose the data type Code, enter the description that is displayed to the right of the code box.</td>
</tr>
<tr>
<td><strong>Currency Col.</strong></td>
<td>Enter the name of the column that contains the currency code associated with a money type.</td>
</tr>
<tr>
<td></td>
<td>If you leave this box empty, the currency is not displayed on the window when you edit or display the value.</td>
</tr>
<tr>
<td><strong>Key String Type</strong></td>
<td>If you chose the data type “Key String”, enter or choose a code for the key string that you want to use.</td>
</tr>
</tbody>
</table>
### In this field in the Column Types group

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mqval Table Key</td>
<td>This field specifies the name of an MQ Value type column’s original table name (in cases where the column shares values with another table or column). This prevents duplication of MQ Value entries for the same set of values. Enter the name of a table.</td>
</tr>
<tr>
<td>Mqval Col. Key</td>
<td>This field specifies the name of an MQ Value type column’s original column name (in cases where the column shares values with another table or column). This prevents duplication of MQ Value entries for the same set of values. Enter the name of a column.</td>
</tr>
</tbody>
</table>

5 Save your changes.

6 Do one of these options:
   - If you want to change additional properties for the view, continue with “Specifying Column Values” on page 7-25.
   - If you are finished changing view properties, exit Horizon and log back in to view your changes.

### Specifying Column Values

You can specify any values for a column. These values are usually small numbers or integers that stand for one of several options in the column. (For example, the circulation_privilege column in the circulation_privilege_code table has 27 options, each assigned a number from 0 to 26.) The number that you enter determines the circulation privilege you work with.

### To specify column values

1 Open the view for the window that you want to reconfigure.
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

2 Choose the view that you want to edit, or create a new view.
   Horizon displays an Edit Horizon View window.
3. Click **Page Down** or resize the window to display the **Values** group:

![Edit Horizon View](image)

4. Complete these fields as necessary:

<table>
<thead>
<tr>
<th>In this field in the Values group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>Enter the name of the table that the column belongs to.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Enter the name of the column that the value applies to.</td>
</tr>
<tr>
<td>Value</td>
<td>Enter one of the values for the column.</td>
</tr>
<tr>
<td>Short Descr</td>
<td>Enter a short description or label of what the value means.</td>
</tr>
<tr>
<td>Long Descr</td>
<td>Enter a long description or label of what the value means.</td>
</tr>
</tbody>
</table>

5. Save your changes.

6. Exit Horizon and log back in to view your changes.
Adding a Column to a Search List View or Edit Window

The List View group on views usually includes all columns for the table, but only some columns are flagged to display in the list window for that table. (For example, the borrower table has many columns such as borrower_name, btype, location, second_id, expiration_date, and so forth, but only the name and location may display on the List Borrowers window.)

NOTE

Search list windows are exceptions. If a column does not appear in the search list window, it is because that column is not listed in the List View group for that window. To include a column, complete the steps in this task.

The Edit View group on views only includes those columns that appear in the corresponding edit window. (For example, if the btype field does not appear on the Edit Borrower window, it is because the btype column is not listed in the Edit View group for the borrower table.) Consequently, to include a column on an edit window, you need to add that column to the Edit View group for the view for that window.

IMPORTANT

The column that you want to add must already exist in the table and you must know its SQL name. (For a list of tables and their columns, see the Table Structures Guide.) If you want to add a column that does not exist on a table, call Horizon Customer Support.

To add a column to a search list view or edit window

1. Open the view for the window to which you want to add a column. (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

2. Click Page Down or resize the window to display the List View group or Edit View group of the window you are reconfiguring.

3. Using the List View or Edit View drop-down list, view the current column order numbers and determine what order number you want to assign to the new column based on the order numbers already assigned to other columns.

4. Click New.

5. Complete the fields for the group as necessary.
Chapter 7: Introduction to Horizon Views

(For information about what to enter in each field, see the description of the List View group on page 7-14 and the Edit View group on page 7-17.)

NOTE

If you add a column to a search list window, the column name you enter will always be “bib#”. Enter the label that you want and specify the MARC map that accesses the bibliographic information displays for that column. The MARC map is what controls the type of information displayed (title, author, and so forth).

6. Save your changes.
7. Exit Horizon and log back in to view your changes.

Changing the Display of Columns or Fields in List and Edit Windows

You can change the display of columns in list windows and fields in edit windows. When you choose a column from the drop-down list in the Edit Horizon View window, Horizon displays the corresponding group entry, where you can edit the properties of the chosen column:

This section explains these topics:

- Reordering Columns or Fields
- Changing the Width of a Column or Field
- Changing the Label for a Column or Entry Field
Reconfiguring List and Edit Windows

Reordering Columns or Fields

You can rearrange the order in which columns appear in a list window, or the order in which fields appear in an edit window. The order of columns or fields is determined by the order or “ord” number assigned to each column or field. This figure illustrates the relationship between a column’s order number, specified in the view, and the column’s placement in a list window:

![Diagram showing column order numbers and their placement in a list window]

On list and edit windows, the order numbers increase from left to right or top to bottom. In this example, order number 10, the Title, is the column at the top of the list. The author column is order number 20, the TitleD column is order number 30.

Re-arranging the columns or fields is a process of switching the column order numbers. Because no two columns or fields can share the same order number, you must temporarily assign the first column or field to a temporary order number in order to “free up” its original order number for the second column or field.

**NOTE**

Assign order numbers in increments of five or ten. This leaves unused numbers between used numbers that you can assign to columns or fields directly.

To reorder columns or fields

1. Open the view for the list or edit window with columns or fields that you want to rearrange.
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)
2. Click Page Down or resize the window to display the List View group or Edit View group for the columns or fields you want to rearrange.
3 In the **List View** or **Edit View** drop-down list, choose the column that currently uses the order number that you want to assign another column or field.

4 In the **Ord** field, enter an unused order number, such as “100.”

   (For example, if you are switching the order numbers of the location, which might be two, and the call number field, which might be three, you would select the location column.)

5 Click **Save**.

   Horizon saves the temporary order number.

   **NOTE**

   You must change the order number to an unused number because a list or edit window cannot have two columns or two fields in the same place. If you try to assign the same order number to two different columns or fields, Horizon displays an error message.

6 In the **List View** or **Edit View** drop-down list, choose the column with the order number that you want to change to the original number.

7 In the **Ord** field, change the order number to the original number.

   (For this example, you would change the “3” to “2.”)

8 Click **Save**.

   The order number that you just changed (for example, “3”) is now unused and available. You need to change the other column’s temporary order number to the unused one.

   (In this example, you would change the location’s temporary number from “100” to “3.”)

9 In the **List View** or **Edit View** drop-down list, choose the first column you changed (the one with the temporary order number of “100”).

10 In the **Ord** field, change the order number to the unused number.

11 Save your changes.

12 Exit Horizon and log back in to view your changes.
Changing the Width of a Column or Field

You can change the width of columns and fields to make them wider or narrower. (For example, you could change the width of the second_id column in the borrower record from twelve to eight spaces.)

To change the width of a column or field

1. Open the view for the window with the columns or fields for which you want to change the width.
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)
2. Click Page Down or resize the window to display the List View group or Edit View group of the window you are reconfiguring.
3. Choose the column that you want from the List View or Edit View drop-down list:
   - In the No. of Display Characters field, enter the number of characters that you want this column or field to use.
     For a column in a list window, the number you enter in this field is the number of characters that displays from the database column. For a field in an edit window, the number you enter determines the width of the field. Higher numbers make the field larger and lower numbers make the field smaller.
4. Save your changes.
5. Exit Horizon and log back in to view your changes.

Changing the Label for a Column or Entry Field

You can give easily recognizable names to columns that appear as columns on list windows, and as fields edit windows. (For example, the column “second_id” on either the Borrower List window or the Edit Borrower window might show under the label “E-mail Alias,” making it clear what information belongs to that field.)

You can change the labels of the columns or fields; however, you cannot change the name of the column that the label refers to. (For example, you could change the label “E-mail Alias” of the second_id field to a label such as “Soc. Sec. No.” The column name “second_id” would remain the same and should not be changed.)

To change the label for a column or entry field

1. Open the view for the window with the columns or fields for which you want to change the label.
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)
2 Click Page Down or resize the window to display the List View group or Edit View group of the window you are reconfiguring.

3 Choose the column with the label that you want to change from the List View or Edit View drop-down list:

![Edit Horizon View](image)

The column that you want to change the label for.

4 Enter the label in the Column Label field.

5 Save your changes.

6 Exit Horizon and log back in to view your changes.

**NOTE**

The Column Name and the Column Label will not necessarily be the same. The Column Name refers to the SQL column in the database. The SQL column name never changes. The Column Label is what appears as a column or field on a window and can be changed.
Changing List Windows

You can change these properties of any list window:

This section explains these topics:

- Hiding or Displaying a Column in a List
- Specifying What MARC Information Is Displayed in Search and Reserve Bookroom (RBR) List Windows
- Choosing How Columns Sort Data

Hiding or Displaying a Column in a List

Many Horizon list windows display only some of the columns contained in the table. Upon installation, the Borrower list, for example, displays only an alphabetical list of borrowers and their second_id; however, other columns exist such as the borrower#, location, and btype columns; you can display these columns or hide ones currently displayed.

*WARNING*

When displaying or hiding a column as explained in this task, you are not deleting or adding an SQL column; you are only hiding or displaying an existing column. The changes made in a view do not affect columns in the database; they affect only the way that users see the database.

Do not use the Delete command in the File menu to delete a column. Doing so permanently removes the column from tables. If you delete a column, you may be charged for support time to fix the problem.

To hide or display a column in a list

1. Open the view for the list window that you want to reconfigure. (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)
2. Click Page Down or resize the window to display the List View group of the window you are reconfiguring.
3. Choose the column that you want to display or hide from the List View drop-down list.
4. Do one of these options:
   - Mark the Displayed box to display the column.
   - Clear the Displayed box to hide the column.
5. Save your changes.
6. Exit Horizon and log back in to view your changes.
Chapter 7: Introduction to Horizon Views

Specifying What MARC Information Is Displayed in Search and Reserve Bookroom (RBR) List Windows

You can specify what bibliographic information appears for a column in the Bibliographic Detail and RBR list windows. You do this by assigning a MARC map to the column in the List View group of the corresponding view. (For example, if you want to display title information for the title column in the Bibliographic Detail window, you would enter the display MARC map that retrieves title information.)

**IMPORTANT**

Assign only display MARC maps. Do not assign MARC maps used for indexing.

**NOTE**

You can display up to 120 entries of MARC record information in the window.

Before You Begin

If you have not already done so, create the display MARC map that you want to use. (For instructions, see “Changing or Creating a MARC Map” on page 2-106.)

**To specify what MARC information is displayed in search and RBR list windows**

1. Open the view for the search window for which you want to specify MARC information. (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)
2. Click Page Down or resize the window to display the List View group of the window you are reconfiguring.
3. Choose the column that you want to assign the MARC map to from the List View dropdown list.
   If the column does not appear in the list, you can add it. (For instructions, see “Adding a Column to a Search List View or Edit Window” on page 7-27.)
4. In the MARC Map field, enter or choose the code for the MARC map that you want. You can specify a conditional display MARC map if you want.
5. Make sure that the Displayed box is marked.
6. Save your changes.
7. Exit Horizon and log back in to view your changes.
Choosing How Columns Sort Data

Horizon lets you sort data in a list window using any of the displayed columns. (For example, you can sort a list of book titles by their publication dates.)

You can choose how Horizon sorts columns in list windows by default. You do this by assigning a sort processor to columns that you want to sort in a list window. Sort processors use specific filing rules to sort data. (Horizon also uses processors as it indexes data for searching and displaying information.) Note that not all columns in a list window use sort processors. This is because you do not need to sort some column data, such as phone numbers, by specific criteria.

Because columns in list windows use sort processors to sort data, you can choose to sort columns in list windows in Horizon in the same way that you sort search results. (For example, if you want to sort titles in your PO Line list window alphabetically, you can choose to use the same processor that your alphabetic browse index uses.) The more familiar you are with the processors that your search indexes use, the more you will be able to “mirror” that sorting behavior in your list windows.

By default, Horizon sets the sort processor for each column in a list window in the Horizon system. You can choose to change the sort processor that each column in a list window uses.

You follow this process when you choose how columns sort data:

To choose how a column sorts data

1. Open the view for the list window that you want to change the sorting for. (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)
2. Click Page Down or resize the window to display the List View group.
3. Choose the column that you want to change the sorting for from the List View drop-down list.
Horizon displays the group entry for the chosen column:

4 In the Sort Processor field, enter or choose the code for a sort processor.
5 Save your changes.

---

**Changing Edit Windows**

You can change these properties for edit windows:

This section explains these topics:

- Adding or Editing the Default Value for a Field
- Changing Editing Properties
- Changing Display Properties

**Adding or Editing the Default Value for a Field**

You can specify default data that appears in edit views each time a new edit view is opened. You can enter a default location in the edit view group for the view that controls item records. Authorized staff users can change this default information in individual edit views at any time if the information in the field is editable.

**To add or edit the default value for a field**

1 Open the view for the window that contains the field for which you want to add or edit a default.
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)
2 Click Page Down or resize the window to display the Edit View group of the window that you are reconfiguring.
3 Choose the column that you want from the Edit View drop-down list.
4 Enter or delete a default value in the Default Value field.
5 Save your changes.
Changing Editing Properties

You can control how an edit window functions when users edit information in it. These functions are referred to as edit properties. Edit properties include these properties:

- **Whether the column information is able to be edited.** If you choose not to allow a column to be edited, the information in that column appears as display-only.
- **Whether the column requires information before users can save the record.** When you make a column required and users attempt to save a record without entering information in that column, Horizon prompts the users to fill in that column.
- **Whether information in a column is copied into a new record from an existing record.**
- **Whether information in a column can be changed simultaneously for a group of selected records.**

To change editing properties

1. Open the view for the edit window that you want to change editing properties for. (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)
2. Click Page Down or resize the window to display the Edit View group of the window that you are reconfiguring.
3. Choose the column that you want from the Edit View drop-down list.
4. Mark one or more of these boxes:
   - **Editable.** Lets users enter information in a field (as opposed to fields that show display-only information).
   - **Required.** Prompts users to fill in the field if they attempt to save a record with the field empty.
   - **Empty on Copy.** Deletes information in the chosen field when the record is copied. You will need to mark this box for fields that are unique for each record, such as the Barcode field on item records.
   - **Batch Change.** Lets users batch edit the field for a group of records.
5. Save your changes.
6. Exit Horizon and log back in to view your changes.

Changing Display Properties

You can control how Horizon displays column information on edit windows. These functions are referred to as display properties. Display properties include these properties:

- **Whether a check box for the column appears to the right of or below the column label.** This applies only to columns that are Boolean column types.
- **Whether the column appears to the right of or below the previous column.**
- **Whether a short or a long value appears for the column.** This applies only to columns that are radio buttons. Values are defined in the Values group of the view. If the column does not require values, you do not need to specify this property.
To change display properties

1. Open the view for the edit window that you want to change display properties for.
   
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

2. Click Page Down or resize the window to display the Edit View group of the window you are reconfiguring.

3. Choose the column that you want from the Edit View drop-down list.

4. Mark one or more of these boxes:
   - **Check Box Under.** Displays the check box under the column label.
   - **Adjacent to Previous.** Displays the column that you are working with to the right of the previous column.
   - **Radio Long Values.** Displays the long value or description (usually fully spelled out text) for the column. This applies only to radio button columns.

   **IMPORTANT**
   Only columns that are Boolean column types can have check boxes. These types of fields require an “on” or “off” value—“on” represented by 1 and “off” represented by 0. When you are working with boxes that appear in a group, such as the Usage boxes in the Address group in the Edit Location Parameters view, you need to edit the view for the address table. This is because the group is controlled by the view for the address table, not by the view for the location table. Those changes will appear in the group as well.

5. Save your changes.

6. Exit Horizon and log back in to view your changes.

Adding a Group to a View

A group on a view is a link to another table. A group lets you enter multiple values for information stored in the linked table without having to open the separate table. The setup of the view of the linked table applies to any groups that appear for that table. (For example, if you edit the address table to which the location view is linked, the changes appear in the Address group of the Edit Location Parameters window.) (For more information about groups, see the “Horizon User Interface” chapter of the Horizon Basics Guide.)

Because each table has its own view to control its edit and list properties, adding a group to one view consists only of specifying the view for the other table.

**NOTE**

Groups occupy an ord position as do single columns. Therefore, you need to assign each group a unique ord number (that is, an ord number that is not used by either another group or another single column). Display the selection drop-down list for both the Edit View group and the Edit Links group to see which ord numbers are used.
To add a group, you need to know these details:

- **The view that controls the display of the table you are linking.** (This is the table the group will show.)
  (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

- **The column the two tables have in common.** (This is referred to as a “link column”.) A link column is the column that Horizon uses to determine what row in one table is related to another row in another table. (To determine the link columns between tables, see the *Table Structures Guide*.)

- **Where you want the group to appear in relation to other fields on the window.** To determine this, look up the ord numbers of the columns or groups that will appear before and after the group that you are adding. You can assign the new group any number between the other two fields.
To add a group to a view

1. Open the view for the window to which you want to add a group.
   (For instructions on opening the correct view, see “Finding and Opening the Correct View” on page 7-6.)

2. Click Page Down or resize the window to display the Edit Links group of window you are configuring:

3. Complete these fields as necessary:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ed. Order</td>
<td>Enter the number for the order or position of the group in relation to the other fields. This should be a unique number.</td>
</tr>
<tr>
<td>Linked View</td>
<td>Enter or choose the view that controls the display of the information that appears in the group. (For example, if you want to add a group for phone numbers to the Edit Borrower window, the linked view would be borrower_phone.)</td>
</tr>
<tr>
<td>Label</td>
<td>Enter the label that appears at the upper-left corner of the group.</td>
</tr>
<tr>
<td>Link Column(s)</td>
<td>Enter the column that the linked view has in common with the view you are working with. (For example, if you are linking the borrower_phone view to the borrower view, the link column would be borrower#.)</td>
</tr>
</tbody>
</table>
Working with Alternate Views

The alternate view feature lets you create alternate views from existing Horizon views. The purpose of alternate views is to let you customize views to fit the needs of certain users in your library. (For example, you may want to restrict part time circulation clerks from changing borrowers’ btypes. In this case, you can create an alternate “borrower” view with the btype column set to be uneditable.)

You can alter views to display alternate window titles and field names, make column data editable or display-only, omit or change the order of certain columns in the view, and so forth.

In addition, you can create alternate views that restrict the records that display in a list window. (For example, you can specify that only “Student” btype records display in the List Borrower Circulation Types window for the alternate “btype” view. This type of alternate view requires you to create a new SQL view.)

After you create alternate views, you need to assign the alternate views to view sets and assign the view sets to users.

This section explains these topics:

- Creating Alternate Views
- Assigning Alternate Views to View Sets
- Assigning a View Set to a User
- Creating a SQL View for an Alternate View
- Giving a User View-only Access to an mq_view
- Troubleshooting Alternate Views

*WARNING*

In order to create alternate views in Horizon, you must have a thorough knowledge of views.

4  Save your changes.

5  Exit Horizon and log back in to view your changes.
Creating Alternate Views

You create alternate views from existing Horizon views. Before you create alternate views, you need to determine what group of users you are creating view sets for. (For example, you may want to create a set for the medical library staff or for temporary staff.)

You complete these two tasks to create alternate views:

- Copying an Existing View
- Changing View Display Properties

Copying an Existing View

You copy an existing view and make changes to the copy of the view to create an alternate view. It is important for you to write down the name of the existing view that you are changing. You need to know the standard view name from which the alternate view is created in order to assign alternate views to view sets.

*WARNING*

Copying some views and using them as alternate views may cause data corruption. If you want to copy any of these views, call Customer Support: address, borrower, email_param, import_source, item_arch, item_report, item_status_group_edit, location, search_filter_query, and vendor.

To copy an existing view

1. Open the mq_view (Horizon View Definitions) view in the Table Editor.
   Horizon displays the List Horizon View window overlaid by the Search window:

2. In the Search for field, enter the name of the standard view that you want to copy and change into an alternate view.
   (For example, enter “borrower” if you want to create an alternate view for the borrower view.)
(For more information on which Horizon views configure which Horizon windows, see “Horizon Windows & Mq Views” in the Table Structures Guide.)

3 Click **OK**.

Horizon displays the List Horizon View window, showing the name of the view that you entered.

4 Choose **File, Copy Record**.

**IMPORTANT**

You must copy the existing view to make an alternate view. If you do not make a copy of the view, you may accidentally make changes to the standard view.

Horizon displays the Edit Horizon View window for the view that you are copying:

5 Enter the new name of the alternate view in the **Mq view** field.

6 Save your changes.

**IMPORTANT**

If you do not change the view name of the alternate view, Horizon cannot display the new alternate view. If the alternate view that you are creating is built from a SQL view, you must enter the name of the SQL view in the Table Name field or Horizon cannot display the alternate view with the row restriction that you specified in the SQL view.

You can now change the display of the alternate view.

**Changing View Display Properties**

You can change views to display alternate window titles and column labels, make column data editable or display-only, omit or change the order of certain columns in the view, and so forth. This section includes tables listing several view properties that you can change, as well as view
properties that you should not change. (For complete information on configuring Horizon views, see “Configuring Horizon Windows” in the Table Structures Guide.)

**WARNING**

Use caution when omitting columns from views. Horizon relies on the existence of some columns in order to display list and edit windows correctly. If you omit columns from an alternate view display, you should experiment with the alternate views in a test or training database to see if Horizon displays the list and edit windows of the view correctly.

View Display Properties That You Can Change

<table>
<thead>
<tr>
<th>To change this display property</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Window title</td>
<td>“Specifying General Properties” on page 7-10.</td>
</tr>
<tr>
<td>● Editing records (rows in a list window)</td>
<td></td>
</tr>
<tr>
<td>● Deleting records (rows in a list window)</td>
<td></td>
</tr>
<tr>
<td>● Adding records (rows in a list window)</td>
<td></td>
</tr>
<tr>
<td>● Displaying/hiding display columns in a list window</td>
<td>“Specifying List Properties” on page 7-13</td>
</tr>
<tr>
<td>● Showing long/short column values in a list window</td>
<td></td>
</tr>
<tr>
<td>● Displaying/hiding display fields in an edit window</td>
<td>“Specifying Edit Properties” on page 7-16</td>
</tr>
<tr>
<td>● Default value displayed in field</td>
<td></td>
</tr>
<tr>
<td>● Field or column label</td>
<td>“Specifying List Properties” on page 7-13 or “Specifying Edit Properties” on page 7-16</td>
</tr>
<tr>
<td>● Number of display characters in a column or field</td>
<td></td>
</tr>
</tbody>
</table>
**Mq_view Properties That You Should Not Change**

*WARNING*

If you make changes to any of the properties listed in this table, you may cause serious problems with your Horizon system.

<table>
<thead>
<tr>
<th>For more information on this Mq_view property</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Slice</td>
<td>“Specifying General Properties” on page 7-10</td>
</tr>
<tr>
<td>• Xrefs</td>
<td></td>
</tr>
<tr>
<td>• Columns: ‘ord’</td>
<td></td>
</tr>
<tr>
<td>• Creation Date</td>
<td></td>
</tr>
<tr>
<td>• Update Date</td>
<td></td>
</tr>
<tr>
<td>• Base Table Name</td>
<td></td>
</tr>
<tr>
<td>All properties</td>
<td>“Specifying Column Types” on page 7-21</td>
</tr>
<tr>
<td>All properties</td>
<td>“Specifying Column Values” on page 7-25</td>
</tr>
</tbody>
</table>

**IMPORTANT**

Once you make changes to the alternate mq_view that you created, you must close and re-open the Table Editor before you can assign any alternate mq_views to view sets.

**Assigning Alternate Views to View Sets**

You organize the alternate views that you have created into view sets. (For example, you could create a view set to include all alternate views for temporary staff.)

**NOTE**

Alternate views assigned to a user’s view set are exceptions and do not represent a user’s entire set of views. In other words, Horizon does not limit a user to view only those alternate views assigned to their view set—a user has access to all views that their passkey and user name allows. In order to display the alternate view for a user, Horizon checks to see if an alternate view exists for that view, and if so, Horizon displays the alternate view rather than the standard view.

**To assign alternate views to view sets**

1. Open the **view_set** (Horizon View Definitions) view in the Table Editor. Horizon displays the List View Sets window.
2. Click **New**.
Horizon displays the Edit View Sets window:

3 Complete these fields as necessary:

<table>
<thead>
<tr>
<th>In this field or group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Set</td>
<td>Enter the name of the view set. This field has a 30-character limit.</td>
</tr>
<tr>
<td>Descr</td>
<td>Enter a description of the view set. This field has a 255-character limit.</td>
</tr>
<tr>
<td>Alternates group</td>
<td>1 In the Std Mq View field, enter or choose the code for the standard view that you want to use. (For example, if you created an alternate borrower view, you would enter “borrower” as the standard view.)</td>
</tr>
<tr>
<td></td>
<td>NOTE You must enter both the standard and alternate view names as part of the view set in order for Horizon to determine whether to display the standard or alternate view for a particular user.</td>
</tr>
<tr>
<td></td>
<td>2 In the Alt Mq View field, enter or choose the code for the alternate view that corresponds to the standard view. (For example, if you created an alternative view for the borrower standard view, you would enter the name of the alternate view in this field.)</td>
</tr>
</tbody>
</table>

4 Save your changes.
Assigning a View Set to a User

You assign a view set to a user on the user record. If you do not assign a view set to a user, the standard views will display for the user.

To assign a view set to a user

1. Start the User Manager process.
   The default location of this process is the Administration\Security Menu folder on the navigation bar.
   Horizon displays the User Manager window.
2. Highlight the user to whom you want to assign a view set.
3. Click Edit to display the User window.
4. In the View Set drop-down list, choose the view set that you want to assign to the user.
5. Save your changes.
6. Close any open records for your changes to take effect.

NOTE
Once you have set up alternate views, restart all Horizon applications in order for the alternate views to display.

Creating a SQL View for an Alternate View

If you want to restrict the records (rows) that display in a list window, you can create a SQL view on which you base your alternate view.

*WARNING*
If you do not have fundamental SQL knowledge, do not attempt to create SQL views.

Before You Begin

Before you can create the SQL view, you need to know the table from which the standard view is built. You can find the name of the table on the first page of the view in the Table Name field. Once you create the SQL view, you replace the table name on the first page of the alternate view with the name of the SQL view you created.

To create a SQL view for an alternate view

1. Open an SQL query tool, such as SQL Advantage or ISQL.
2. Connect to the correct server and database.
3. Enter a query to create the new SQL view.
For example, if you want to display only those item records with the collection of “per” (periodical), you may enter a query like this:

```sql
create view item_periodical
as
select * from item
where collection = 'per'
```

4 Execute the query.

*WARNING*

If the function associated with the SQL view slows down dramatically, this may mean that there is a problem with the SQL view definition. In this case, you can run DBDBUG to see if accessing the SQL view in Horizon causes a table scan.

Once you have created the SQL view for the alternate view, you need to enter the name of the SQL view in the Table Name field on the first page of the view:

(For information on this page of the view, see “Specifying General Properties” on page 7-10.)
Giving a User View-only Access to an mq_view

For cases where you want a user to be able to view information, but not edit it, you can set up an alternate mq_view and view set. For example, this is useful when setting up the Reserve Bookroom "Set defaults" when you need to see the location, itype, collection, and withdr instr mq_views.

To give a user view-only access to an mq_view

1. Create an alternate mq_view with a different security privilege number for the appropriate tables. For example, the location, itype, and collection tables. For location, you can use “rbr_location” as an alternate mq_view that references the location table, but with with no add/edit rights.
   For detailed steps, see “Creating Alternate Views” on page 7-42.
2. Create a view set that maps each of these views to the view-only alternate mq_view you just created.
   For detailed steps, see “Assigning Alternate Views to View Sets” on page 7-45.
3. Assign this view set to the users that need viewing rights but not editing rights.
   For detailed steps, see “Assigning a View Set to a User” on page 7-47.

Troubleshooting Alternate Views

You may experience difficulty while setting up and displaying alternate views. (For example, you may have set up an alternate view but it does not display correctly or does not display at all.) This section explains typical problem scenarios and solutions.

I created an alternate view and assigned it to a standard view, but when I display the window in Horizon, the window displays exactly like the standard view.

- You may have copied the standard view, but made no changes to the copy. If so, the alternate view displays just as the standard one. Display the alternate view in the Table Editor to see if you made any changes.
- You may have not assigned the correct alternate view to the standard view. Display the Edit View Sets window in the Table Editor to make sure you assigned the alternate view to the correct standard view.
- You may have accidentally reversed the names of the standard and alternate views in the Edit View Sets window.
- You may have created an alternate view for a view that does not perform the function you want. (For example, you created an alternate view for the borrower view thinking you could add borrowers from this view. But, you can only add borrowers within Circulation. In this case, you would have to create an alternate view for the borrower_fast_add view.)
- You may not have assigned the alternate view to a view set.
- You may not have assigned a view set with the alternate view to the view set of the logged in user.
- You may not have logged into Horizon as the user assigned to the alternate view that is part of the view set.
- You may not have exited Horizon and logged back in after creating alternate views.
I created an alternate view, assigned the alternate view to a view set, but now the alternate view displays for all users and not just those in the view set.

- Rather than copying the view to make an alternate view, you may have made changes to the standard view. All users can see the changes you made to the standard view.

I created an alternate view, but when I try to display the edit window for the alternate view, I get an error message and cannot display the edit window.

- You may have omitted columns from the view display that are required columns. Horizon requires some columns to be part of the view display in order to display the edit window correctly. You may want to experiment with the alternate views in a test or training database to see if Horizon displays the edit window correctly.
- You may have omitted required columns from the SQL view from which the alternate view is built. Horizon requires some columns to be part of the SQL view in order to display information correctly. (For example, the item view requires the item# column.) You may want to experiment with the alternate views in a test or training database to see if Horizon displays the edit window correctly.

I created a SQL view that restricts the rows that display in the list window, but the list window seems to ignore the restriction and displays all the rows in the list box.

- There may be an error in the SQL query you executed to create the SQL view. (For example, you may have not included the restriction in the SQL view query.)
- You may not have assigned the alternate view to a view set.
- You may not have assigned a view set with the alternate view to the view set of the logged in user.
- You may not have logged into Horizon as the user assigned to the alternate view that is part of the view set.
- You may not have exited Horizon and logged back in after creating alternate views.
This appendix contains a list of Horizon views and the windows those views configure.
Horizon Views and the Windows They Configure

This appendix contains a table listing this information:

- Horizon views.
- The windows those views configure.
- The views that control a list or edit window, or both.

You can use this information to change the display of Horizon windows. When you know the view that controls the window that you see in Horizon, you can open the view and change the display for that window.

You can change these elements of Horizon windows:

- Window title.
- Field labels.
- Order of fields.
- Whether or not fields are displayed.

(For instructions on how to change views, see “Reconfiguring List and Edit Windows” on page 7-9.)

*WARNING*

When you make any change to a Horizon view, note the change in the customization table; otherwise, the change may be lost with the next upgrade.
## Horizon Views

<table>
<thead>
<tr>
<th>View</th>
<th>Window Title</th>
<th>Window Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>abbie</td>
<td>Prediction - Exceptions</td>
<td>List Edit</td>
</tr>
<tr>
<td>account</td>
<td>Budget</td>
<td>List Edit</td>
</tr>
<tr>
<td>account_user</td>
<td>Budget User</td>
<td>List Edit</td>
</tr>
<tr>
<td>account_year</td>
<td>Budget Year</td>
<td>List Edit</td>
</tr>
<tr>
<td>account_year_create_options</td>
<td>Options for Creating New Fiscal Year Allocations</td>
<td>List Edit</td>
</tr>
<tr>
<td>account_year_roll</td>
<td>Batch Reassign Budgets</td>
<td></td>
</tr>
<tr>
<td>account_year_roll_options</td>
<td>Options for Batch Reassign Budgets</td>
<td></td>
</tr>
<tr>
<td>acq_claims_review</td>
<td>Acquisitions Claims Review</td>
<td>List</td>
</tr>
<tr>
<td>acq_parameter</td>
<td>Acquisitions Parameters</td>
<td>List Edit</td>
</tr>
<tr>
<td>address</td>
<td>Location Address</td>
<td>List Edit</td>
</tr>
<tr>
<td>address_blink</td>
<td>Location Address</td>
<td>List Edit</td>
</tr>
<tr>
<td>add_fee</td>
<td>Add Fee</td>
<td>Edit</td>
</tr>
<tr>
<td>advanced_booking</td>
<td>Advanced Booking</td>
<td>List Edit</td>
</tr>
<tr>
<td>advanced_booking_pac</td>
<td>Advanced Booking</td>
<td>List</td>
</tr>
<tr>
<td>ala_charset</td>
<td>ALA Charset Codes</td>
<td>List Edit</td>
</tr>
<tr>
<td>ala_non_spacing</td>
<td>ALA Non-spacing Chars</td>
<td>List Edit</td>
</tr>
<tr>
<td>ala_to_cp</td>
<td>ALA to Codepage Translation</td>
<td>List Edit</td>
</tr>
<tr>
<td>allreq</td>
<td>All Requests</td>
<td>List</td>
</tr>
<tr>
<td>all_title_list</td>
<td>All Titles</td>
<td>List</td>
</tr>
<tr>
<td>approve_statement</td>
<td>Acq-Statement Approval</td>
<td>List</td>
</tr>
<tr>
<td>article</td>
<td>Initial Articles</td>
<td>List Edit</td>
</tr>
<tr>
<td>article_exception</td>
<td>Phrase Exceptions for Articles</td>
<td>List Edit</td>
</tr>
<tr>
<td>auth_control</td>
<td>Status Information</td>
<td>Edit</td>
</tr>
<tr>
<td>auth_import_control</td>
<td>Authority Import Control</td>
<td>List Edit</td>
</tr>
<tr>
<td>auth_match_point</td>
<td>Authority Match Points</td>
<td>List Edit</td>
</tr>
<tr>
<td>auth_status</td>
<td>Auth Status Codes</td>
<td>List Edit</td>
</tr>
<tr>
<td>auth_tag</td>
<td>Auth Tag Definition</td>
<td>List Edit</td>
</tr>
<tr>
<td>auth_workform_control</td>
<td>Auth Workform Control Table</td>
<td>Edit</td>
</tr>
<tr>
<td>begin_end_dates</td>
<td>Acq-PO Line Item Copy Dates</td>
<td>Edit</td>
</tr>
<tr>
<td>View</td>
<td>Window Title</td>
<td>Window Type</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>bibdisp</td>
<td>Bibliographic Detail</td>
<td>List</td>
</tr>
<tr>
<td>biblist</td>
<td>Titles</td>
<td>List</td>
</tr>
<tr>
<td>bib_auth_invalid_audit</td>
<td>Invalid Bib Auth Audit Log</td>
<td>List</td>
</tr>
<tr>
<td>bib_call</td>
<td>Bib Call Numbers</td>
<td>List</td>
</tr>
<tr>
<td>bib_category_code</td>
<td>Bib Category Codes</td>
<td>List</td>
</tr>
<tr>
<td>bib_compound_subfield</td>
<td>Bib Compound Subfield</td>
<td>List</td>
</tr>
<tr>
<td>bib_control</td>
<td>Status Information</td>
<td>Edit</td>
</tr>
<tr>
<td>bib_co_tag</td>
<td>Bib Co-tag Definition</td>
<td>List</td>
</tr>
<tr>
<td>bib_co_tag_subfield</td>
<td>Bib Co-Tag Subfield</td>
<td>List</td>
</tr>
<tr>
<td>bib_import_control</td>
<td>Bib Import Controls</td>
<td>List</td>
</tr>
<tr>
<td>bib_match_point</td>
<td>Bib Match Points</td>
<td>List</td>
</tr>
<tr>
<td>bib_status</td>
<td>Bib Status Codes</td>
<td>List</td>
</tr>
<tr>
<td>bib_subfield</td>
<td>Bib Subfield</td>
<td>List</td>
</tr>
<tr>
<td>bib_tag</td>
<td>Bib Tag Definition</td>
<td>List</td>
</tr>
<tr>
<td>binder_find</td>
<td>Find Binder</td>
<td>List</td>
</tr>
<tr>
<td>binding_bundle</td>
<td>Binding Bundles</td>
<td>List</td>
</tr>
<tr>
<td>binding_bundle_instructions</td>
<td>Instructions</td>
<td>List</td>
</tr>
<tr>
<td>binding_bundle_issue</td>
<td>Bundle Issues for Bundle ID</td>
<td>List</td>
</tr>
<tr>
<td>binding_bundle_not_received</td>
<td>Shipped Bundles Not Yet Received</td>
<td>List</td>
</tr>
<tr>
<td>binding_bundle_print_workform</td>
<td>No window title. (This view contains bundle workform information.)</td>
<td>Edit</td>
</tr>
<tr>
<td>binding_claim_type</td>
<td>Binding Claim Types</td>
<td>List</td>
</tr>
<tr>
<td>binding_copy</td>
<td>Binding Information</td>
<td>List</td>
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## Appendix A: Horizon Views

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