Horizon
Cataloging Setup Guide

SirsDynix
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This guide explains the setup tasks you need to do before your cataloging staff can use Horizon Cataloging. Once you set up Cataloging, you need to change these settings only when your library’s MARC standard definitions change.
About This Guide

Welcome to the Cataloging Setup Guide. This guide explains the tasks you need to do to configure Horizon so that it handles MARC records in a way that matches your library standards. Once you set up Cataloging, you can use Horizon for tasks such as creating, importing, and exporting records, creating fast-added records, verifying the authority records attached to bibliographic (bib) records, and so forth. You use the tools in the Security Menu to set up which staff members can do various tasks in the MARC Editor, and whether they can view or edit MARC record components. (For more information, see “Using Security in Cataloging” on page S-153 or the “Security and Preferences” chapter of the System Administration Guide.)

This guide explains these topics:

- Understanding MARC Records
- Setting Up or Changing Valid MARC Record Components
- Setting Up Browse Link
- Setting Up a Merge Profile
- Adding a Search to Bib Quick Search
- Setting Up Uniform Titles
- Working with Linking Tags
- Setting Up Batch Item Delete
- Setting Up Modulus 10 Item Barcode Verification
- Setting Up Import Source Parameters
- Setting Up Item Activity Tracking for Imported Records
- Setting Up Export Parameters
- Viewing the Invalid Audit Log
- Specifying Bib Information in Fast-Added Records
- Setting Up Bib and Authority Record Statuses
- Setting Up Call Numbers
- Setting Up Non-MARC Parameters
- Understanding Deferred Indexing
- Displaying Horizon in a Right-to-Left Layout
- Using Security in Cataloging

NOTE

This guide assumes that you know how to use the Table Editor. (For more information, see “Horizon Table Editor” in the “Getting Started” chapter of the System Administration Guide.)

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.
Understanding MARC Records

Before you begin setting up Cataloging parameters, you should have a basic understanding of MARC standards and MARC records, including tags, indicators, and subfields. (For general MARC information, see the “MARC Editing” chapter in the Cataloging Guide. For specific tag, indicator, and subfield standards, see your MARC manuals or the Library of Congress web site at this address: “http://www.loc.gov/marc/”.)

Among other things, MARC standards define how Horizon creates different kinds of MARC records. (For example, a bib record contains tags and subfields different from those in an authority record; a bib record of a map contains tags and subfields different from those in a bib record of a computer file.)

Setting Up or Changing Valid MARC Record Components

When your library installed Horizon, both bib and authority records were defined as “cataloging types” according to the MARC standards your library uses. The cataloging type establishes the possible tags and subfields you can use when you add a record of that type to your database. You can edit or add to these cataloging types as needed using processes found in the Cataloging Control Menu folder:

IMPORTANT

You should never delete a cataloging type you did not create. If you accidentally delete a basic cataloging type, you may be able to re-create it yourself. If you need help, contact your system administrator.
You must have cataloging types defined before valid tags, subfields, and indicators can be created in MARC records. (Your staff can enter invalid components in MARC records. Invalid components can be searched and indexed, but Horizon marks them as errors based on your MARC definitions.)

If you need help with this task, contact your system administrator.

NOTE

You specify whether your library uses USMARC or UNIMARC tags when you set up your system-wide parameters in the matham view. You also use the matham view to set up certain subfield, punctuation, and import options. (For more information, see “System-Wide Settings” in the “General Setup” chapter of the System Administration Guide and “Other Subfield Setup Tasks” on page S-36.)

You can edit the cataloging types and valid MARC components (such as tags, subfields, and indicators) that catalogers can add to MARC records depending on your library’s MARC standards. (If you upgraded from a previous version of Horizon, your existing definitions were imported.) You might choose to edit these components for these kinds of reasons:

- To add local tags such as local call numbers, local subject headings, and so forth.
- To determine which components are valid for a given format as well as which components are repeatable.
- To make some tags mandatory.
- To make it impossible to add duplicates of certain tags.
- To add newly-defined official MARC components not yet represented in the tables as supplied by Horizon.
- To set up uniform titles.

Catalogers can add valid and invalid components directly into a MARC record. They can also display a list of valid tags or subfields to choose from:
Setting Up or Changing Valid MARC Record Components

Here is an example of a list of valid subfields:

![Select Subfield(s) to Add](image)

**NOTE**

If you set up the MARC Editor to use error checking, any invalid MARC components that catalogers add can display in the MARC Editor using a different font color so that they are easily recognizable. (For more information, see “Choosing Field Options” in the Cataloging Guide.)

Whenever you open a MARC record in the MARC Editor, Horizon checks to see how you have defined the parts of a record, and whether the parts of the record you open are valid according to your definitions. Horizon lets you define your MARC records using a process called Syntax and Validation.

The Syntax and Validation process lets you set up or change these MARC components:

- **Cataloging types.** A cataloging type defines the components of your MARC records and how they relate to each other. For each cataloging type, you can set up or change these things:
  - General parameters, such as the order in which the tags of a MARC record display.
  - Advanced parameters, such as validation procedures for specialized data.

- **Tags.** MARC rules define what information a tag identifies. The term “tag” is sometimes used to designate an entire piece of information, including the three-digit number, the indicator, and all the subfields. For each MARC tag, you can set up and change these things:
  - General features, such as the tag’s required level and repeatability.
  - Linking relationships.
  - Indicator usage and values.
  - Advanced procedures, such as updating usage codes for authority records.
- **Subfields.** A subfield contains information within a field. Each subfield starts with a delimiter and is labeled with either a letter or number, called a subfield code. For each subfield, you can set up and change these things:
  - General parameters, such as linking relationships, read-only status, how the subfield behaves when a MARC record is saved, display spacers, and spell check action.
  - Advanced procedure, such as validation of ISBNs or ISSN.

- **Elements.** In MARC records, elements are codes in fixed fields. They are also control subfields (subfield w) in other tags such as authority 400 tags. For each element, you can set up and change things such as position and values information, repeatability, and read-only status.

This illustration shows the organization of the main System and Validation Setup process. If you know the part of the software you want to go to, you can use this illustration to find that part and do the task you need:

Some parts of the Syntax and Validation Setup use “grids.” Grids are windows containing columns and rows of information that display current MARC settings. You can edit most of the fields in the columns and rows in multiple ways. (For example, you can sometimes edit data directly in a field, or use a drop-down list to choose what you want to enter.) Some grids also let you access other parts of the setup. Horizon also uses separate windows called “forms” for each component. Each form consists of a tab that contains fields that either display read-only information or let you enter new information that defines the MARC component you are working with. Often, a grid summarizes the information from the form. (For information on how to use grids and forms, see “Working with Grids and Forms” in the “Horizon User Interface” section of the Horizon Basics Guide.)
If you know that you want to change only one MARC component, you can use a shortcut. Horizon calls these shortcuts “Quick Setups.” Quick Setup processes are available for indicators, subfields, and elements. You can use any of these Syntax and Validation processes at any time.

**IMPORTANT**

Before Horizon recognizes any of the changes you make in any of the Syntax and Validation Setup processes, you must close the Launcher and restart it.

This section explains these topics:

- Using Syntax and Validation Setup
- Setting Up or Changing Web-Accessible Help
- Setting Up or Changing a Cataloging Type
- Setting Up or Changing a Tag
- Setting Up or Changing a Subfield
- Setting Up or Changing an Element

### Using Syntax and Validation Setup

The main Syntax and Validation Setup process lets you access grids, forms, and windows where you can define every aspect of the MARC records in your database. You can make changes to the entry codes and descriptions of the basic Cataloging Type setups from the main Syntax and Validation Setup grid. You can also use this main window to access the MARC record setup forms.

**To use Syntax and Validation Setup**

1. Start the Syntax and Validation Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon displays the Syntax and Validation Setup grid:

   You can sort on some columns by double-clicking the column heading. An arrow displays in the heading to show that the information in the grid is sorted by the information in that column.

   **You may need to click the maximize button to see the entire grid.**

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

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

   You can edit some fields by clicking in the field and choosing an option from a drop-down list.
2 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Cat Standard  | Do not change this field.  
The drop-down list displays a code that represents the MARC standard your library uses (for example, USMARC). Horizon displays the description for the code in the read-only field of the drop-down list.  
You cannot define a new standard. If your library changes its MARC standard, contact SirsiDynix Customer Support for help. |
| Cat Type      | Do not change this field.  
Horizon displays a unique number for each cataloging type defined for your system. The defaults delivered with Horizon are USMARC standard 100 (bib) and 101 (auth). |
| Entry Code    | Enter a code that identifies the cataloging type. |
| Description   | Enter a description of the cataloging standard.  
If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description. |
| Base Table    | Do not change this field.  
Horizon displays the name of the Horizon table from which the cataloging type takes its information.  
The defaults delivered with Horizon are bib and auth. |

3 Save your changes.
Setting Up or Changing Web-Accessible Help

Catalogers can get help with what should display in a tag or subfield while they are working in the MARC Editor by positioning the mouse pointer in the tag or subfield for which they need help and pressing SHIFT+F1. This accesses a web page of information. Horizon provides default links to the Library of Congress Web site for tag help. You can change or add to these URLs.

**NOTE**

Web-accessible help works only if the workstation from which the cataloger tries to access an URL has Internet access and an appropriate browser.

To set up or change Web-accessible help

1. Start the Cat Help URL Setup process.

   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.

   Horizon opens the Cat Help URL Setup window:

   You can sort on some columns by double-clicking the column heading. An arrow displays in the heading to show that the information in the grid is sorted by the information in that column.

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

   You add new items to this grid by entering information directly into empty grid fields.

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

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

   An arrowhead identifies the row where your mouse indicator is currently located.
2 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry Code</td>
<td>Enter the code you want to use for the type of help.</td>
</tr>
<tr>
<td>Desr</td>
<td>Enter a description of the type of help. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description.</td>
</tr>
<tr>
<td>Help Url</td>
<td>Enter the URL for the help.</td>
</tr>
</tbody>
</table>

3 Save your changes.

Setting Up or Changing a Cataloging Type

The Cat Type form in Syntax and Validation Setup lets you define information for all aspects of each cataloging type.

This section explains these topics:
- Setting Up or Changing General Cataloging Type Parameters
- Setting Up or Changing Advanced Cataloging Type Parameters

Setting Up or Changing General Cataloging Type Parameters

The General tab lets you define information such as the sort tag action.

To set up or change general cataloging type parameters

1 Start the Syntax and Validation Setup process. The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar. Horizon displays the Syntax and Validation Setup window.

2 Double-click on the left-most column of the row describing the cataloging type you want to change. Horizon displays a Cat Type form General tab for the cataloging type you chose. Here is an example:

These read-only fields display information from the Syntax and Validation Setup window.
This read-only field displays the name of the Horizon table from which the cataloging type takes its information. (The defaults delivered with Horizon are bib and auth.)

In this field Do this
Entry Code Enter the code you want to use for the type of help.
Descr Enter a description of the type of help. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description.
Help Url Enter the URL for the help.
### Setting Up or Changing Valid MARC Record Components

3 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry Code</td>
<td>Enter a code that identifies the cataloging type.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the cataloging type. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description.</td>
</tr>
<tr>
<td>Sort Tag Action</td>
<td>Use the drop-down list to enter the kind of sort you want to apply to tags in your library’s bib records.</td>
</tr>
<tr>
<td></td>
<td><strong>Horizon sorts the tags on a MARC record whenever you reformat or save the record.</strong> You can choose one of these sort options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Alpha.</strong> This arranges the tags in alphabetical order. (This option is currently not available.)</td>
</tr>
<tr>
<td></td>
<td>• <strong>Group.</strong> This arranges the tags in numerical order by the first number only. (For example, 1xx tags come before 5xx tags, but 5xx tags display in the order in which they are added to the bib record. This lets a 520 tag display above a 505 tag.)</td>
</tr>
<tr>
<td></td>
<td>• <strong>None.</strong> This leave the tags in the order in which they were entered into the record.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Numeric.</strong> This arranges the tags in numerical order by all three numbers in the tag.</td>
</tr>
</tbody>
</table>

4 Save your changes.
Setting Up or Changing Advanced Cataloging Type Parameters

The cataloging type Advanced tab lets you define procedures for creation and validation events. Horizon initially comes with no creation event procedures. Your system administrator can work with SirsiDynix to set up custom programming.

The cataloging type Advanced tab also lets you set up MARC maps. You use the Cat Subtype MARC Map field to specify the subtype of a record so that you can differentiate requirement levels between different subtypes. (For instructions on differentiating requirement levels, see “Setting Up or Changing Advanced Tag Parameters” on page S-24.)

To set up or change advanced cataloging type parameters

1. Start the Syntax and Validation Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon displays the Syntax and Validation Setup window.

2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   Horizon displays a Cat Type form General tab.

3. Click the Advanced tab.
   Horizon displays a Cat Type form Advanced tab:

4. Use available drop-down lists to choose valid event procedures or MARC maps.
   If your library has not coordinated with SirsiDynix for custom programmed event procedures, you cannot choose anything from the lists.
5 Complete these fields to set up MARC map cataloging subtypes:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cat Subtype</td>
<td>Choose the cataloging subtype MARC map for which you want to specify valid subtypes.</td>
</tr>
<tr>
<td>Subtypes</td>
<td>Enter or edit the valid cataloging subtypes for the current MARC map.</td>
</tr>
</tbody>
</table>

6 Save your changes.

### Setting Up or Changing a Tag

The Tags tab of the Cat Type form in Syntax and Validation Setup lets you define information for all aspects of each MARC tag, including fixed fields. (Syntax and Validation Setup treats a fixed field like any other tag.) You can use the Indicator Quick Setup shortcut to access the Indicators tab more quickly.

**NOTE**

You should make changes or add information to a tag only if the change or addition meets your library’s policies and standards.

This section explains these topics:

- Setting Up or Changing Basic Tag Information
- Setting Up or Changing General Tag Parameters
- Setting Up or Changing Tag Linking
- Setting Up or Changing an Indicator
- Using Indicator Quick Setup
- Setting Up or Changing Advanced Tag Parameters
Setting Up or Changing Basic Tag Information

The Tags tab grid lets you change basic tag information such as the tag number, the tag’s label, or the tag’s description:

To set up or change basic tag information

1. Start the **Syntax and Validation Setup** process.
   The default location of this process is the `Cataloging\Cataloging Control Menu` folder on the navigation bar.
   Horizon displays the Syntax and Validation Setup window.

2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   Horizon displays a Cat Type form General tab.

3. Click the **Tags** tab.
   Horizon displays a Cat Type form Tags tab. Here is an example:

   ![Diagram of Cataloging Setup Guide](image)

   **Labels display in the body of the MARC record when you choose View and Labeled or Labeled Vertical.**

   **Tag numbers**

   **You can sort on some columns by double-clicking the column heading. An arrow displays in the heading to show that the information in the grid is sorted by the information in that column.**

   **You can edit the form for a row by double-clicking on the left-most column of the row.**

   ![Diagram of Cataloging Setup Guide](image)

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

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

   **You add new items to a grid by entering information directly into empty grid fields or by double-clicking on the asterisk when an ellipsis displays. This opens a new form that lets you enter more information.**

   ![Diagram of Cataloging Setup Guide](image)
Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag</td>
<td>Enter the MARC tag number.</td>
</tr>
</tbody>
</table>
| Label         | Enter a label for the tag.  
   If you use a language other than US-English, a globe dropdown icon indicates that you may be able to choose a translation for this item’s label. The label displays in a labeled view of a record in the MARC Editor. |
| Description   | Enter a description of the tag.  
   If you use a language other than US-English, a globe dropdown icon indicates that you may be able to choose a translation for this item’s description. The description displays in the colored header of a record in the MARC Editor. |

Save your changes.

**Setting Up or Changing General Tag Parameters**

The cataloging tag General tab lets you define information such as the required level and repeatability of each tag.

**To set up general tag parameters**

1. Start the **Syntax and Validation Setup** process.  
The default location of this process is the `Cataloging\Cataloging Control Menu` folder on the navigation bar.  
Horizon displays the Syntax and Validation Setup window.
2. Double-click on the left-most column of the row describing the cataloging type you want to change.  
Horizon displays a Cat Type form General tab.
3. Click the **Tags** tab.
4. Double-click on the left-most column of the row describing the tag you want to change.
Horizon displays a Cat Tag form General tab. Here is an example:

![Image of Cat Tag form General tab]

5 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Label         | Enter a label for the tag.  
If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s label. The label displays in a labeled view of a record in the MARC Editor. |
| Description   | Enter a description of the tag.  
If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description. The description displays in the colored header of a record in the MARC Editor. |
### Setting Up or Changing Valid MARC Record Components

**Req Level**

Use the drop-down list to enter the requirement level you want to apply to this tag in your library’s bib records.

You can choose one of these requirement levels:

- **Mandatory.** The tag must be included in every MARC record of this cataloging type.
- **Mandatory Appl.** The tag must be included in every MARC record of this cataloging type if it is appropriate for the item, and if the information is available.
- **Mandatory Fatal.** The tag must be included in every MARC record of this cataloging type. If it is not, the record cannot be saved in your database.
- **Not Allowed.** The tag cannot be added to a MARC record of this cataloging type.
- **Optional.** The tag is not required, but may be included in any MARC record of this cataloging type.

**NOTE**

All requirement levels except Mandatory Fatal are descriptive only. Horizon does not enforce other levels of requirement.

**Repeatability**

Use the drop-down list to enter the repeatability level you want to apply to this tag in your library’s bib records.

You can choose one of these levels:

- **Indicator Controlled.** The indicator specified by your library’s MARC standard determines the repeatability.
- **Limited Count.** The tag can be repeated as many times as you indicate in the Repeat Count field (explained in this table).
- **Non Repeatable.** A given MARC record can have only one instance of this tag.
- **Non-Repeatable Fatal.** The tag cannot be repeated in a MARC record of this cataloging type. If it is, the record cannot be saved in your database.
- **Unlimited Count.** A given MARC record can have as many instances of this tag as needed.

**NOTE**

Horizon comes with the 245 tag set to Non-Repeatable Fatal. Additionally, you cannot add more than one grouped tag (for example, 1XX tags).

**Repeat Count**

If you choose Limited Count in the Repeatability field of this tab, you must enter a maximum number of times the tag can be repeated in a given MARC record.

**Cat Help**

Use the drop-down list to choose the URL that gives appropriate cataloging help from the MARC Editor when the cataloger presses \( \text{SHIFT}+\text{F1} \).

(For instructions on setting up cataloging help, see “Setting Up or Changing Web-Accessible Help” on page S-10.)

---

### Table

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Req Level</td>
<td>Use the drop-down list to enter the requirement level you want to apply to this tag in your library’s bib records. You can choose one of these requirement levels:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Mandatory.</strong> The tag must be included in every MARC record of this cataloging type.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Mandatory Appl.</strong> The tag must be included in every MARC record of this cataloging type if it is appropriate for the item, and if the information is available.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Mandatory Fatal.</strong> The tag must be included in every MARC record of this cataloging type. If it is not, the record cannot be saved in your database.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Not Allowed.</strong> The tag cannot be added to a MARC record of this cataloging type.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Optional.</strong> The tag is not required, but may be included in any MARC record of this cataloging type.</td>
</tr>
<tr>
<td>Repeatability</td>
<td>Use the drop-down list to enter the repeatability level you want to apply to this tag in your library’s bib records. You can choose one of these levels:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Indicator Controlled.</strong> The indicator specified by your library’s MARC standard determines the repeatability.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Limited Count.</strong> The tag can be repeated as many times as you indicate in the Repeat Count field (explained in this table).</td>
</tr>
<tr>
<td></td>
<td>- <strong>Non Repeatable.</strong> A given MARC record can have only one instance of this tag.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Non-Repeatable Fatal.</strong> The tag cannot be repeated in a MARC record of this cataloging type. If it is, the record cannot be saved in your database.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Unlimited Count.</strong> A given MARC record can have as many instances of this tag as needed.</td>
</tr>
<tr>
<td>Repeat Count</td>
<td>If you choose Limited Count in the Repeatability field of this tab, you must enter a maximum number of times the tag can be repeated in a given MARC record.</td>
</tr>
<tr>
<td>Cat Help</td>
<td>Use the drop-down list to choose the URL that gives appropriate cataloging help from the MARC Editor when the cataloger presses ( \text{SHIFT}+\text{F1} ). (For instructions on setting up cataloging help, see “Setting Up or Changing Web-Accessible Help” on page S-10.)</td>
</tr>
</tbody>
</table>
### Setting Up or Changing Tag Linking

Horizon lets you link records in several different ways. (For example, you can link authority tags to bib records, bib records to other bib records or files, or authority records to other authority records.) (For more information on linking records, see “Adding a Component to a MARC Record” in the “MARC Editing” chapter of the Cataloging Guide and “Working with Linked Bib Records” in the “Bibliographic Records” chapter of the Cataloging Guide.)

The cataloging type Linking tab lets you define linking types for entire tags. (For information about linking individual subfields, see “Setting Up or Changing General Subfield Parameters” on page S-28.)

#### To set up or change tag linking

1. Start the Syntax and Validation Setup process.
   - The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   - Horizon displays the Syntax and Validation Setup window.

2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   - Horizon displays a Cat Type form General tab.

3. Click the Linking tab.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag Group</td>
<td>If this tag belongs to a group (for example, a main heading [1XX] group), use the drop-down list to choose the code and description for this tag. If you choose a tag group, Horizon will not save a record that contains more than one tag from the group. (To remove a tag group from this field, highlight the text in the field and press DELETE.)</td>
</tr>
<tr>
<td>Main Entry</td>
<td>If this tag is a main entry tag, mark this box.</td>
</tr>
</tbody>
</table>

6. Save your changes.
Horizon displays a Cat Type form Linking tab. Here is an example:

You can sort on some columns by double-clicking the column heading. An arrow displays in the heading to show that the information in the grid is sorted by the information in that column.

You can edit some fields by marking the boxes.

An arrowhead identifies the row where your mouse indicator is currently located.

You add new items to this grid by entering information directly into empty grid fields.

You can edit most fields by choosing options from the drop-down list that you can access when you click the field.

4 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag</td>
<td>Use the drop-down list to choose the tag number.</td>
</tr>
<tr>
<td>Link To Cat Type</td>
<td>Use the drop-down list to choose whether this tag links to a bib or authority cataloging type.</td>
</tr>
<tr>
<td>Link To Tag</td>
<td>Use the drop-down list to choose a tag to which this tag should link.</td>
</tr>
<tr>
<td>See Tag</td>
<td>If you want this tag to be a See tag, mark this box.</td>
</tr>
<tr>
<td>See Also Tag</td>
<td>If you want this tag to be a See Also tag, mark this box.</td>
</tr>
<tr>
<td>Auth Type</td>
<td>Use the drop-down list to choose the authority type this tag should have.</td>
</tr>
<tr>
<td></td>
<td>You can choose one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Author</td>
</tr>
<tr>
<td></td>
<td>• None (use this for no linkage or for bib-to-bib links)</td>
</tr>
<tr>
<td></td>
<td>• Series</td>
</tr>
<tr>
<td></td>
<td>• Subject</td>
</tr>
</tbody>
</table>
Setting Up or Changing a Tag

The cataloging tag Indicators tab lets you define information such as indicator position, usage, and value. If you want to set up or change only indicators, you can also use the Indicator Quick Setup process. (For instructions, see “Using Indicator Quick Setup” on page S-23.)

To set up or change an indicator

1. Start the Syntax and Validation Setup process.
   - The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   - Horizon displays the Syntax and Validation Setup window.
2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   - Horizon displays a Cat Type form General tab.
3. Click the Tags tab.
4. Double-click on the left-most column of the row describing the tag you want to change.
5. Click the Indicators tab.

5. Save your changes.

### Setting Up or Changing an Indicator

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linking Type</td>
<td>Use the drop-down list to choose the linking type this tag should have.</td>
</tr>
<tr>
<td></td>
<td>You can choose one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Main Heading—Reciprocal Link</td>
</tr>
<tr>
<td></td>
<td>• Non-Main Heading—Reciprocal Link</td>
</tr>
<tr>
<td></td>
<td>• Unidirectional link (One-way)</td>
</tr>
<tr>
<td>Ask If Manual</td>
<td>If you are setting up an authority tag and want Horizon to ask catalogers for the link type (reciprocal or one-way) when they add this tag, mark this box.</td>
</tr>
<tr>
<td>Default Reciprocal</td>
<td>If you are setting up an authority to authority (4XX) link, mark this box.</td>
</tr>
</tbody>
</table>
Horizon displays a Cat Tag form Indicators tab. Here is an example:

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

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

The Values grid displays information related to the row you highlight in the Positions grid.

Click on a row to display the appropriate information for the Values grid in the lower half of the window.

You can sort on some columns by double-clicking the column heading. An arrow displays in the heading to show that the information in the grid is sorted by the information in that column.

The information displayed in the Values grid changes, depending on which row of the Positions grid you highlight.

6 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positions Indicator</td>
<td>Enter the position of the indicator.</td>
</tr>
<tr>
<td>Positions Label</td>
<td>Enter a label for the indicator. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s label. The label displays in a labeled view of a record in the MARC Editor.</td>
</tr>
<tr>
<td>Positions Description</td>
<td>Enter a description for the indicator. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description. The description displays in the colored header of a record in the MARC Editor.</td>
</tr>
</tbody>
</table>
Setting Up or Changing a Tag

Using Indicator Quick Setup

If you want to set up or change only indicator information (such as indicator position, usage, and value), you can use the Indicator Quick Setup process.

To use Indicator Quick Setup

1. Start the Indicator Quick Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon opens the Indicator Quick Setup window.
2. In the Cat Type drop-down list, choose the cataloging type you want.
3. In the Tag drop-down list, choose the Tag you want.
   Horizon fills the Positions grid in the Configuration group with information for the cataloging type and tag you chose.
4. Click on the left-most column of the row describing the indicator you want to work with.

7. Save your changes.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Positions Ind Usage</strong></td>
<td>Use the drop-down list to choose a usage for the indicator.</td>
</tr>
<tr>
<td></td>
<td>You can choose one of these options:</td>
</tr>
<tr>
<td></td>
<td>• None. No information is required in this position—the indicator is undefined.</td>
</tr>
<tr>
<td></td>
<td>• Nonfiling. The indicator gives a number for nonfiling characters for this tag. Catalogers can override this number.</td>
</tr>
<tr>
<td></td>
<td>• Normal. The indicator describes something other than filing status or subject scheme.</td>
</tr>
<tr>
<td></td>
<td>• Subject Scheme. On a subject tag, the indicator describes the source of your subject headings (such as Library of Congress or Sears).</td>
</tr>
<tr>
<td><strong>Positions Default Value</strong></td>
<td>Enter the default value for the indicator.</td>
</tr>
<tr>
<td><strong>Values Value</strong></td>
<td>Click the left-most column of the row to choose the value you want to use for the indicator you highlighted in the Positions grid.</td>
</tr>
<tr>
<td></td>
<td>These fields list the valid values for the indicator of the tag you are working with. Do not change these fields.</td>
</tr>
<tr>
<td><strong>Values Description</strong></td>
<td>Enter a description for the value.</td>
</tr>
<tr>
<td></td>
<td>If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description. The description displays in the colored header of a record in the MARC Editor.</td>
</tr>
</tbody>
</table>
Horizon fills the Values grid in the Configuration group with information for the indicator you chose:

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

The Values grid displays information related to the row you highlight in the Positions grid.

1. Click on a row to display the appropriate information for the Values grid in the lower half of the window.

Setting Up or Changing Advanced Tag Parameters

The cataloging tag Advanced tab lets you define procedures for creation, validation, and update events. Horizon initially comes with no creation event procedures. Your system administrator can work with SirsiDynix to set up custom programming.

One tag level validation event is provided for 245 tags. Horizon validates this tag by looking for a 1xx main entry. If one does not exist, the title becomes the main entry.

One update event is provided for USMARC authority use codes in 008 tags. This event keeps an authority record from being changed when that authority is attached to a bib record.

You can also set up requirement levels for cataloging subtypes.

To set up or change advanced tag parameters

1. Use the table in “Setting Up or Changing an Indicator” (page S-22) to work with the Indicator Quick Setup window.

2. Save your changes.

5. Use the table in “Setting Up or Changing an Indicator” (page S-22) to work with the Indicator Quick Setup window.

6. Save your changes.

Setting Up or Changing Advanced Tag Parameters

The cataloging tag Advanced tab lets you define procedures for creation, validation, and update events. Horizon initially comes with no creation event procedures. Your system administrator can work with SirsiDynix to set up custom programming.

One tag level validation event is provided for 245 tags. Horizon validates this tag by looking for a 1xx main entry. If one does not exist, the title becomes the main entry.

One update event is provided for USMARC authority use codes in 008 tags. This event keeps an authority record from being changed when that authority is attached to a bib record.

You can also set up requirement levels for cataloging subtypes.

To set up or change advanced tag parameters

1. Start the Syntax and Validation Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon displays the Syntax and Validation Setup window.

2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   Horizon displays a Cat Type form General tab.

3. Click the Tags tab.

4. Double-click on the left-most column of the row describing the tag you want to change.
   Horizon displays a Cat Tag form General tab.
5 Click **Advanced**.

Horizon displays a Cat Tag form Advanced tab:

6 Use available drop-down lists to choose valid event procedures.

If your library has not coordinated with SirsiDynix for custom programmed event procedures, you may not be able to choose anything from the lists.

7 Complete these fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cat Subtype</td>
<td>Choose the cataloging subtype for which you want to set a requirement level exception.</td>
</tr>
<tr>
<td>Req Level</td>
<td>Choose the exception of the general requirement level for the current cataloging subtype.</td>
</tr>
</tbody>
</table>

(For more information on requirement levels, see “Setting Up or Changing General Tag Parameters” on page S-16.)

8 Save your changes.
Setting Up or Changing a Subfield

The Subfields tab of the Cat Tag form in Syntax and Validation Setup lets you define information for all aspects of each MARC subfield. It also lets you identify the subfields in which you want Horizon to check the spelling. If you want to set up or change only subfields, you can also use the Subfield Quick Setup shortcut to access the Subfield tab more quickly. (For instructions, see “Using Subfield Quick Setup” on page S-34.)

NOTE

You should make changes or add information to a subfield only if the change or addition meets your library’s policies and standards.

This section explains these topics:

- Setting Up or Changing Basic Subfield Information
- Setting Up or Changing General Subfield Parameters
- Setting Up and Maintaining Spell Check
- Setting Up or Changing Advanced Subfield Parameters
- Using Subfield Quick Setup
- Other Subfield Setup Tasks

Setting Up or Changing Basic Subfield Information

The Subfields tab grid lets you change basic subfield information, such as a subfield’s label or description.

To set up or change basic subfield information

1. Start the Syntax and Validation Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon displays the Syntax and Validation Setup window.
2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   Horizon displays a Cat Type form General tab.
3. Click the Tags tab.
4. Double-click on the left-most column of the row describing the tag you want to change.
5. Click the Subfields tab.
Horizon displays a Cat Tag form Subfields tab. Here is an example:

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

You can edit the form for a row by double-clicking on the left-most column of the row.

You add new items to a grid by entering information directly into empty grid fields or by double-clicking on the asterisk. This opens a new form that lets you enter more information.

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

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subfield</td>
<td>Enter the subfield.</td>
</tr>
</tbody>
</table>
| Label         | Enter a label for the subfield.  
If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s label. The label displays in a labeled view of a record in the MARC Editor. |
| Description   | Enter a description for the subfield.  
If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description. The description displays in the colored header of a record in the MARC Editor. |

6 Complete or update these fields as needed:

7 Save your changes.
Setting Up or Changing General Subfield Parameters

The cataloging Subfield General tab lets you define information such as linking parameters or read-only attributes. (For more information on linking records, see “Adding a Component to a MARC Record” in the “MARC Editing” chapter of the Cataloging Guide and “Working with Linked Bib Records” in the “Bibliographic Records” chapter of the Cataloging Guide.)

To set up or change general subfield parameters

1. Start the Syntax and Validation Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon displays the Syntax and Validation Setup window.

2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   Horizon displays a Cat Type form General tab.

3. Click the Tags tab.

4. Double-click on the left-most column of the row describing the tag you want to change.

5. Click the Subfields tab.
   Horizon displays a Cat Tag form Subfields window.

6. Double-click on the left-most column of the row describing the subfield you want to change.
   Horizon displays a Cat Subfield form General tab. Here is an example:

   ![Example of Cat Subfield form General tab]

   - This read-only field displays information from the Syntax and Validation Setup window.
   - This read-only field displays the letter or number of the subfield that you chose to edit.
   - This read-only field displays the number of the tag you chose to edit.
   - This read-only field displays a description of the item you chose in the accompanying field.
7. Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Enter a label for the subfield. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s label. The label displays in a labeled view of a record in the MARC Editor.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the subfield. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description. The description displays in the colored header of a record in the MARC Editor.</td>
</tr>
<tr>
<td>Is Linking</td>
<td>If this subfield should always link to another subfield, mark this box and enter information in the Link To Subfield field (explained in this table). (For example, mark this box if the subfield should be authority-controlled.)</td>
</tr>
<tr>
<td>Link To Subfield</td>
<td>If you marked the Is Linking box in this tab, enter the subfield to which this subfield should link.</td>
</tr>
<tr>
<td>Is Readonly</td>
<td>If you want your catalogers to see but not edit this subfield, mark this box.</td>
</tr>
<tr>
<td>Delete Empty</td>
<td>If you want Horizon to remove this subfield from a MARC record when the subfield contains no information and the record is saved, mark this box.</td>
</tr>
<tr>
<td>Auto Add</td>
<td>If you want this subfield to display when the tag you are working with is added to a record, mark this box.</td>
</tr>
</tbody>
</table>
| Repeatability       | Use the drop-down list to enter the repeatability level you want to apply to this subfield in the tag you are working with. You can choose one of these levels:  
  • **Indicator Controlled.** The indicator specified by your library’s MARC standard determines the repeatability.  
  • **Non Repeatable.** You can have only one instance of this subfield in the tag you are working with.  
  • **Unlimited Count.** You can have as many instances of this subfield in this tag as you need. |
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Req Level         | Use the drop-down list to enter the requirement level you want to apply to this subfield in the tag you are working with.  
You can choose one of these requirement levels:  
- **Mandatory.** The tag must be included in every MARC record of this cataloging type.  
- **Mandatory Appl.** The tag must be included in every MARC record of this cataloging type if it is appropriate for the item, and if the information is available.  
- **Mandatory Fatal.** The tag must be included in every MARC record of this cataloging type. If it is not, the record cannot be saved in your database.  
- **Not Allowed.** The tag cannot be added to a MARC record of this cataloging type.  
- **Optional.** The tag is not required, but may be included in any MARC record of this cataloging type.  

**NOTE**  
All requirement levels except Mandatory Fatal are descriptive only. Horizon does not enforce other levels of requirement. |
| Display Spacer    | If you want to change Horizon’s display spacer, enter the new spacer here.  
As defined by the MARC standard, Horizon uses a double hyphen ( -- ) as its display spacer value. |
| Cat Help          | Use the drop-down list to choose the URL that gives appropriate cataloging help from the MARC Editor when the cataloger presses SHIFT+F1.  
(For instructions on setting up cataloging help, see “Setting Up or Changing Web-Accessible Help” on page S-10.) |
| Default Value     | If you marked the Auto Add box, enter the default value you want Horizon to enter automatically into this subfield. |
| Spell Check Action| Use the drop-down list to choose English Dictionary if you want the MARC Editor to use the spell checker on this subfield.  
If you choose <NONE>, the spell checker will not check this subfield. (For more information on spell checking, see “Setting Up and Maintaining Spell Check” on page S-31.) |

8 Save your changes.
Setting Up and Maintaining Spell Check

You can set up Horizon to check the spelling on specific subfields. You may also want to periodically clean up any auxiliary spelling dictionaries catalogers create on their local hard drives.

This section explains these topics:

1. Assigning Spell Check Action to a Subfield
2. Removing Unwanted Words from the Auxiliary Spelling Dictionary

Assigning Spell Check Action to a Subfield

You must assign a spell check action to each subfield for which you want Horizon to check the spelling.

To assign spell check action to a subfield

1. Open the General tab of the Cat Subfield form for a subfield you want Horizon to spell check.
   
   (For instructions, see “Setting Up or Changing General Subfield Parameters” on page S-28.)

2. Use the drop-down list on the Spell Check Action field to choose a dictionary.

3. Repeat steps 1 and 2 for every subfield you want Horizon to spell check.

4. Click OK.

Removing Unwanted Words from the Auxiliary Spelling Dictionary

When catalogers run the spell checker, they can add words to an auxiliary dictionary. Horizon saves the auxiliary dictionary file on the catalogers’ local hard drive in the same Horizon folder where the main dictionary file is located. Because it is easy for your library staff to add words to the auxiliary dictionary, you may occasionally need to remove any added words that should not be considered correctly spelled.

To remove unwanted words from the auxiliary spelling dictionary

1. Open the auxiliary spelling dictionary file in a text editor such as Notepad.
   
   (For instructions, see your Windows user’s guide.) The file name follows this format, where “name” is the name of the spelling dictionary you assigned to the subfields being checked:

   name_ext.DIC

2. Highlight the words you want to remove.

3. Press the Delete key.

4. Save the file.

5. If you removed all the words, you can delete the file.

Setting Up or Changing Advanced Subfield Parameters

The cataloging subfield Advanced tab lets you define procedures for creation, validation, and update events. Two subfield level validations are provided for ISBNs and ISSNs. These validations check the form of the number.
Horizon initially comes with no creation event procedures. Your system administrator can work with SirsiDynix to set up custom programming.

The subfield Advanced tab also lets you set up MARC map categories and links. You use the Category field to choose the MARC map that you want Horizon to use to extract data from a MARC record to identify its category. (For example, in the 008 tag, you choose the USMsubt MARC map.) If you do not specify a Category MARC map, Horizon uses the underscore ( _) as a default. You use the Link MARC map field to choose the MARC map that defines what text is used in searching for matches when you link bib records.

You can also set up requirement level exceptions for cataloging subtypes.

**To set up or change advanced subfield parameters**

1. Start the Syntax and Validation Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon displays the Syntax and Validation Setup window.

2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   Horizon displays a Cat Type form General tab.

3. Click the Tags tab.

4. Double-click on the left-most column of the row describing the tag you want to change.

5. Click the Subfields tab.

6. Double-click on the left-most column of the row describing the subfield you want to change.

7. Click the Advanced tab.
   Horizon displays a Cat Subfield form Advanced tab:

   ![Cat Subfield Form](image)

   These read-only fields display descriptions of the items you choose in the accompanying fields.

8. Use available drop-down lists to choose valid event procedures.
   If your library has not coordinated with SirsiDynix for custom programmed event procedures, you may not be able to choose anything from the lists.
9  Complete these fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cat Subtype</td>
<td>Choose the cataloging subtype for which you want to set a requirement level exception.</td>
</tr>
<tr>
<td>Req Level</td>
<td>Choose the exception of the general requirement level for the current cataloging subtype. (For more information on requirement levels, see “Setting Up or Changing General Subfield Parameters” on page S-28.)</td>
</tr>
</tbody>
</table>

10  Save your changes.
Setting Up or Changing Valid MARC Record Components

Using Subfield Quick Setup

If you want to set up or change only subfield information (including identifying the subfields in which you want Horizon to check the spelling), you can use Subfield Quick Setup.

To use Subfield Quick Setup

1. Start the Subfield Quick Setup process.
   - The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   - Horizon opens the Subfield Quick Setup window.

2. In the Cat Type drop-down list, choose the cataloging type you want.

3. In the Tag drop-down list, choose the Tag you want.

4. Click in the Configuration group grid.
   - Horizon fills the grid in the Configuration group with information for the cataloging type and tag you chose:
      - If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for an item.
      - You can edit some fields by marking the boxes.
      - You can edit some fields by clicking in them and typing new information.
      - You can edit some fields by clicking in the field and choosing an option from a drop-down list.

5. Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subfield</td>
<td>Enter the letter or number of the subfield that you want to add or change.</td>
</tr>
<tr>
<td>Label</td>
<td>Enter a label for the subfield.</td>
</tr>
<tr>
<td></td>
<td>If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s label. The label displays in a labeled view of a record in the MARC Editor.</td>
</tr>
</tbody>
</table>
## Setting Up or Changing a Subfield

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Repeatability       | Use the drop-down list to enter the repeatability level you want to apply to this subfield in the tag you are working with. You can choose one of these levels:  
  - **Indicator Controlled.** The indicator specified by your library’s MARC standard determines the repeatability.  
  - **Non Repeatable.** You can have only one instance of this subfield in the tag you are working with.  
  - **Unlimited Count.** You can have as many instances of this subfield in this tag as you need. |
| Auto Add            | If you want this subfield to display when the tag you are working with is added to a record, mark this box.                               |
| Default Value       | If you marked the Auto Add box, enter the default value you want Horizon to enter automatically into this subfield.                     |
| Spell Check Action  | Use the drop-down list to choose the dictionary you want the MARC Editor to use when you use the spell checker. If you choose <NONE>, the spell checker will not check this subfield. (For more information, see “Setting Up and Maintaining Spell Check” on page S-31.) |
| Display Spacer      | If you want to change Horizon’s display spacer, enter the new one here. As defined by the MARC standard, Horizon uses a double hyphen ( -- ) as its display spacer value. |

6 If you want to keep working in Subfield Quick Setup, do these steps:

1 Click **Apply** to save your changes.
2 Highlight the subfield you want to work with.
3 Double-click on the left-most column of that row.
4 Use one of these tables or tabs to continue working with subfields:
   - “Setting Up or Changing General Subfield Parameters” (page S-29)
   - “Setting Up or Changing Basic Subfield Element Information” (page S-38)
   - “Setting Up or Changing Element Parameters” (page S-41)
   - “Setting Up or Changing Advanced Subfield Parameters” (page S-32)

7 Save your changes.
Other Subfield Setup Tasks

There are several Cataloging features you can activate to enhance the daily cataloging workflow. The features affect how bib records retain and display information.

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 choose to do these additional tasks:

- **Implement authority control based on bib subfields only.** This lets you have different sets of controlled subfields within separate bib tags, even if they are controlled by the same authority tag.

- **Implement authority local subfield preservation.** This lets Horizon retain information you have added to local subfields on authority records when you upgrade or overlay bib records. You will most likely use this feature if you want subfield w preservation on 4xx and 5xx tags. You must implement authority control based on bib subfields only if you want to implement this feature. (The instructions contained within local authority subfields, such as subfield w, are not yet implemented in searching.)

- **Ignore end punctuation on controlled bib subfields for authority matching.** This prevents Horizon from generating duplicate authority records if the only difference is the end punctuation on controlled bib subfields.

- **Preserve original end punctuation on controlled bib subfields.** This lets Horizon preserve and display the original end punctuation in controlled bib subfields instead of replacing them with the end punctuation from corresponding authority tags during authority matching.

Before you activate any of these features, you should stop logging transactions. After you activate the features, you can update your records all at once to take advantage of the new features. Then turn transaction logging back on. (For more information on these tasks, see “Subfield Setup Tasks” in the “General Setup” chapter of the System Administration Guide.)
Setting Up or Changing an Element

When you installed Horizon, a group of formats or categories was set up according to MARC standards to define different kinds of MARC records. (For example, you may have a “bk” category that defines the format for books, or an “mp” category that defines the format for maps.) The 008 tag contains elements that hold the definitions for these formats or categories. You may also find elements in control subfields (subfield w) in other places, such as in authority 400 tags.

The Elements tab of the Cat Subfield form lets you edit or add MARC elements to a tag. You can use the Element Quick Setup shortcut to access the Elements tab more quickly.

You can delete elements, but this can change the records in your database. If you delete an element accidentally, contact Horizon Customer Support to help you restore the element.

NOTE
You should make changes or add information to an element only if the change or addition meets your library’s policies and standards.

This section explains these topics:

- Setting Up or Changing Basic Subfield Element Information
- Setting Up or Changing Element Parameters
- Using Element Quick Setup

Setting Up or Changing Basic Subfield Element Information

The Elements tab grid lets you change basic tag information such as element position and value.

To set up or change basic subfield element information

1. Start the Syntax and Validation Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon displays the Syntax and Validation Setup window.
2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   Horizon displays a Cat Type form General tab.
3. Click the Tags tab.
4. Double-click on the left-most column of the row describing the tag you want to change.
5. Click the Subfields tab.
6. Double-click on the left-most column of the row describing the subfield you want to change.
7. Click the Elements tab.
   Horizon displays a Cat Subfield form Elements tab.
8. Click on the left-most column of the row describing the element position you want to work with.
Setting Up or Changing Valid MARC Record Components

Horizon displays a Cat Subfield form elements tab with the element values listed. Here is an example:

9 Complete or update these fields in the **Element Positions** grid as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category</strong></td>
<td>Review or edit the existing MARC category codes defined for this element by your library’s MARC standards, or create a new one.</td>
</tr>
<tr>
<td></td>
<td><strong>WARNING</strong></td>
</tr>
<tr>
<td></td>
<td>Deleting a category can change the records in your database. Do not edit or delete a category you did not create.</td>
</tr>
<tr>
<td><strong>Offset</strong></td>
<td>Enter a number to define the position the element takes in the tag.</td>
</tr>
<tr>
<td></td>
<td>(For example, an offset of 1 puts the element in the second character position.) Horizon checks this value along with the element’s length and repeat count values. If you set the values incorrectly, Horizon displays an error message when you open a MARC record in the MARC Editor.</td>
</tr>
<tr>
<td><strong>Length</strong></td>
<td>Enter a number to define the length of the element.</td>
</tr>
<tr>
<td></td>
<td>(For example, a tag with an offset of 1 and a length of 3 would fill positions 2 through 4 of the tag.) Horizon checks this value along with the element’s offset and repeat count values. If you set the values incorrectly, Horizon displays an error message when you open a MARC record in the MARC Editor.</td>
</tr>
</tbody>
</table>
### Setting Up or Changing an Element

**10** Complete or update these fields in the **Element Values** grid as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Repeat Count</strong></td>
<td>Enter a number to define the number of times the element is repeated in this tag. Horizon checks this value along with the element’s offset and length values. If you set the values incorrectly, Horizon displays an error message when you open a MARC record in the MARC Editor.</td>
</tr>
<tr>
<td><strong>Label</strong></td>
<td>Enter a label for the element. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s label. The label displays in a labeled view of a record in the MARC Editor.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Enter a description for the element. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description. The description displays in the colored header of a record in the MARC Editor.</td>
</tr>
</tbody>
</table>

**11** Save your changes.
Setting Up or Changing Element Parameters

The cataloging Elements tab lets you define information such as value keys. You use keys to share information between elements instead of setting up the same information in multiple elements. (For example, you can set up language codes in the 008 tag. Instead of setting language codes up again in the 041 tag, you can enter the codes in the keys fields on the Element form for the 041 tag.) You can also set the repeat count of an element position to unlimited (zero [0]) or a number other than one, and then set up the keys to let Horizon repeat the code for you.

**NOTE**

You must enter a value in every the value key field.

To setting up or changing an element's parameters

1. Start the Syntax and Validation Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon displays the Syntax and Validation Setup window.
2. Double-click on the left-most column of the row describing the cataloging type you want to change.
   Horizon displays a Cat Type form General tab.
3. Click the Tags tab.
4. Double-click on the left-most column of the row describing the tag whose elements you want to change.
   Horizon displays a Cat Tag form General tab.
5. Click the Subfields tab.
6. Double-click on the left-most column of the row describing the subfield whose elements you want to change.
   Horizon displays a Cat Subfield form General tab.
7. Click the Elements tab.
8. Double-click on the left-most column of the row describing the element position you want to change.
Horizon displays a Cat Element form window. Here is an example:

In this field | Do this
---|---
Category | Enter the MARC category code for this element.
Length | Enter a number to define the length of the element. (For example, a tag with an offset of 1 and a length of 3 would fill positions 2 through 4 of the tag.) Horizon checks this value along with the element’s offset and repeat count values. If you set the values incorrectly, Horizon displays an error message when you open a MARC record in the MARC Editor.
Repeat Count | Enter a number to define the number of times the element is repeated in this tag.
Label | Enter a label for the category. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s label. The label displays in a labeled view of a record in the MARC Editor.
<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 category. If you use a language other than US-English, a globe drop-down icon indicates that you may be able to choose a translation for this item’s description. The description displays in the colored header of a record in the MARC Editor.</td>
</tr>
<tr>
<td>Is Hidden</td>
<td>If you do not want your catalogers to see this element, mark this box.</td>
</tr>
<tr>
<td>Is Readonly</td>
<td>If you want your catalogers to see but not edit this subfield, mark this box.</td>
</tr>
<tr>
<td>Value Cat Type Key</td>
<td>Use the drop-down list to choose the cataloging type value you want to share.</td>
</tr>
<tr>
<td>Value Tag Key</td>
<td>Use the drop-down list to choose the tag value you want to share.</td>
</tr>
<tr>
<td>Value Subfield Key</td>
<td>Use the drop-down list to choose the subfield value you want to share.</td>
</tr>
<tr>
<td>Value Category Key</td>
<td>Use the drop-down list to choose the category value you want to share.</td>
</tr>
<tr>
<td>Value Offset Key</td>
<td>Use the drop-down list to choose the offset value you want to share.</td>
</tr>
<tr>
<td>Validation Event Proc</td>
<td>Use the drop-down list to choose the event you want. Horizon initially comes with no validation event procedures for elements.</td>
</tr>
</tbody>
</table>

10 Save your changes.
Using Element Quick Setup

If you want to set up or change only MARC elements for a tag, you can use Element Quick Setup.

To use Element Quick Setup

1. Start the Element Quick Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon opens the Element Quick Setup window.
2. In the Cat Type drop-down list, choose the cataloging type you want.
3. In the Tag drop-down list, choose the Tag you want.
   Horizon fills the grid in the Configuration group with information for the cataloging type and tag you chose:
   
   You can sort on some columns by double-clicking the column heading. An arrow displays in the heading to show that the information in the grid is sorted by the information in that column.
   
   You can edit the form for a row by double-clicking on the left-most column of the row.
   
   You can edit the fields by clicking in them and typing new information.

4. Use these tables to continue working with the Element Quick Setup window:
   - “Setting Up or Changing Basic Subfield Element Information” (page S-38)
   - “Setting Up or Changing Element Parameters” (page S-41)
5. Save your changes.
Setting Up Browse Link

Since authority-controlled tags follow a certain format and contain specific information, catalogers should make sure the authority heading that they want to use does not already exist in your library’s database before they create a new one. One way to do this is to use Browse Link to create a link with an existing authority. Browse Link gives catalogers a fast access to linkable records (such as authority records or electronic documents) in your database. Your staff can also use Browse Link with bib to bib linking and Uniform Title linking.

Browse Link works with search types that you set up in the Search view based on the PAC flavors you have defined. This lets your catalogers choose a Browse Link search flavor in the Profile tab of the Customize Editor. (For example, if you want to set up a 650 tag to search for existing subjects in staff search, you must have a subject type search set up in the Search view for stafpac.) If your catalogers do not choose a different Browse Link Search flavor, Horizon uses the default search flavor (pac). (For more information on setting up search types and PAC flavors, see the “Searching Setup” chapter of the System Administration Guide.)

When you installed Horizon, you may have set up Browse Link to work with some tags. If you want your catalogers to be able to search against other tags using Browse Link, you must set up each tag. (For more information on using Browse Link, see “Adding an Authority-Controlled Tag to a Bib Record” in the “MARC Editing” chapter of the Cataloging Guide or “Working with Uniform Titles” in the “Authority Records” chapter of the Cataloging Guide.

To set up Browse Link

1. Start the Browse Link Setup process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   Horizon opens the Browse Link Setup grid:
   You can sort on some columns by double-clicking the column heading. An arrow displays in the heading to show that the information in the grid is sorted by the information in that column.

2. Click in the Cat Type field and choose the cataloging type you want from the drop-down list.

3. Click in the Tag field and use the drop-down list to choose the tag from which you want Browse Link to work.
   You must choose a linkable tag, such as an authority tag.

4. Click in the Tag Extract Marc Map field and use the drop-down list to choose the MARC map from which the tag should extract the information.
The MARC map you choose must be related to the type of Mq Index you choose for this tag.

5. Click in the Mq Index field and use the drop-down list to choose the index you want Horizon to use to search for an existing linking record for this tag. The Mq Index must be defined in a Search type that is assigned to a PAC flavor. (For more information, see the “Searching Setup” chapter of the System Administration Guide.)

6. Repeat this task for every tag you want to set up for Browse Link.

**Setting Up a Merge Profile**

A merge profile lets you define parameters that your catalogers use when they merge records. (For example, the merge profile can determine which tags from the dying bib record are inserted into the surviving bib record.) You can edit existing merge profiles or create new ones. (For more information on merge profiles, see “Choosing a Merge Profile” in the “Customizing the MARC Editor” section of the Cataloging Guide.)

**NOTE**

You must set up merge profiles or Horizon cannot merge records.

**To set up a merge profile**

1. Start the Merge Profile Setup process.
   
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.

   Horizon opens the Merge Profile Setup window:

   ![Merge Profile Setup Window]

   This is a read-only field that displays the entry code for the profile that you are working with. This entry code also displays in the Customize Editor Profile tab.

   The Merge Tags fields become active once you identify a profile in the Merge field of this window.

2. From the Cat Type drop-down list, choose the cataloging type for which you want to develop a merge profile.
3 Do one of these options:
- From the Merge drop-down list, choose the merge profile you want to edit.
- If you want to create a new merge profile, do these steps:

1 Click New Profile.
   Horizon opens a Create a New Merge Profile dialog box:

2 From the Cat Type drop-down list, choose the cataloging type for which you want to create a new merge profile.
   If you chose a cataloging type in the Cat Type field of the Merge Profile Setup window, the cataloging type you chose displays in this dialog box by default.

3 In the Entry Code field, enter a code for your merge profile.

4 Complete or update these fields in the Profile Configuration group as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Enter a description of your profile.</td>
</tr>
<tr>
<td></td>
<td>This description displays in the Customize Editor Profile tab. This is a required field.</td>
</tr>
<tr>
<td>Merge Display Line #X</td>
<td>Enter a label to help your library staff identify the records being merged.</td>
</tr>
<tr>
<td>Label</td>
<td>These labels display in the merge dialog box during the merge task you do in the MARC Editor. (For more information, see “Merging Bib Records” chapter of the Cataloging Guide or “Merging Authority Records: in the “Authority Records” chapter of the Cataloging Guide.) You can enter up to three labels.</td>
</tr>
<tr>
<td>Merge Display Line #X</td>
<td>Use the drop-down list to choose the MARC map from which you want Horizon to extract the data that identifies the records being merged.</td>
</tr>
<tr>
<td>Marc Map</td>
<td>You can enter up to three MARC maps.</td>
</tr>
</tbody>
</table>
Adding a Search to Bib Quick Search

Bib Quick Search lets users find records quickly by searching for a unique identifying term, usually a number. When you install Horizon, staff can quick search by the bib number and the item barcode. (You may also have other searches installed, such as by the ISBN, ISSN, LCCN, or OCLC number, depending on how your indexes are set up.) You can add additional searches to the Bib Quick Search Index list as long as the search you add uses an index that identifies records with unique searchable terms.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merge Tags Tag to Merge</td>
<td>Enter a tag number that you want to always copy into the surviving record.</td>
</tr>
<tr>
<td></td>
<td>You can enter as many tags as you want. You can use a question mark to copy an entire group of tags. (For example, you can enter “5??” to enter all tags that start with a 5, or “65?” to enter all tags that start with 65.) If you enter a complete three-digit number and there are multiple tags with that number in the dying record, Horizon copies only the first tag with that number into the surviving record.</td>
</tr>
<tr>
<td></td>
<td>The tags that you copy over do not replace existing tags in the surviving record.</td>
</tr>
<tr>
<td>Merge Tags Rename to Tag</td>
<td>If you tell Horizon to copy a tag into a surviving record, you can choose a new tag number for it in this field.</td>
</tr>
<tr>
<td></td>
<td>(For example, if you want to copy a 100 tag, you can rename it to a 700 tag.)</td>
</tr>
<tr>
<td>Uniform Call Number</td>
<td>If you want all copies of the merged records to have the same call number, mark this box.</td>
</tr>
</tbody>
</table>

5  Save your changes.
Setting Up Uniform Titles

To add a search to Bib Quick Search

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Enter “bib”.</td>
</tr>
<tr>
<td>Index No.</td>
<td>Enter a number to specify the order in which the search displays</td>
</tr>
<tr>
<td></td>
<td>in the Bib Quick Search window.</td>
</tr>
<tr>
<td></td>
<td>Each index in the 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>Enter the mq_index Bib Quick Search should use to find and display the information you want.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>Choose an index whose search resolves to a single result. Otherwise,</td>
</tr>
<tr>
<td></td>
<td>Horizon opens only the first record it finds that meets the search</td>
</tr>
<tr>
<td></td>
<td>criteria.</td>
</tr>
<tr>
<td>This index contains</td>
<td>Enter the help text that you want to display for the search in the</td>
</tr>
<tr>
<td></td>
<td>main search window.</td>
</tr>
</tbody>
</table>

Setting Up Uniform Titles

In Horizon, you can design an authority record that combines a specific title and its author information into one searchable unit. A borrower can then locate the item as a single “hit” during a PAC search.

To make a uniform title, Horizon creates a new authority record that combines information from the bib record’s uniform title tag (USMARC 240 or 243) and the author tag (100). This information is compounded into one new 100 tag on the new authority record. Horizon maps the two bib record tags (title tag and author tag) to the new authority record. You must rename some of the subfields when they are mapped to the authority record, as required by MARC standards.
The new combined authority tag is made up of subfields from these tags:

- **The co-tag.** The co-tag provides the author portion of the uniform title.
- **The uniform title tag.** The uniform title tag provides the title portion of the uniform title, as well as any other information that you want to include for the uniform title search. (For example, you could include the language of the item.) The uniform title tag is compounded with the co-tag to make the combined authority tag, and so is sometimes called a “compound tag.”

Setting up a uniform title includes creating a uniform title tag; defining the linking properties of the tag and subfield a; and defining the bib co-tag. When you set up co-tags, you determine which co-tags map to the authority tag that contains the uniform title; the authority type of the uniform title; and (to some extent) the sequence of the subfields in the uniform title.

**To set up a uniform title tag**

1. Start the **Syntax and Validation Setup** process.
   - The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   - Horizon displays the Syntax and Validation Setup grid.
2. Highlight the Bib cat standard.
3. Double-click on the left-most column of that row.
   - Horizon opens a Cat Type form.
4. Click the **Linking** tab.
5. If no uniform title tag exists, do these steps to create one:

   1. Double-click on the asterisk with the ellipsis (*...*) in the left-most column.
   2. Enter the number of the uniform title tag you want to create.
      
      (For example, for USMARC, enter “240” or “243”.)

6. Complete or update these fields as needed to define the linking properties of the uniform title tag:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link to Cat Type</td>
<td>Use the drop-down list to choose the authority cataloging type.</td>
</tr>
<tr>
<td>Link to Tag</td>
<td>Enter “100”.</td>
</tr>
<tr>
<td>Auth Type</td>
<td>Use the drop-down list to choose not authority-controlled.</td>
</tr>
<tr>
<td>Linking Type</td>
<td>Use the drop-down list to choose one-way (unidirectional).</td>
</tr>
</tbody>
</table>

7. Click **Apply**.
8  Do these steps to define the linking properties of subfield a:

1. Click the **Tags** tab.
2. Highlight the uniform tag you want to use.
3. Double-click on the left-most column of that row.
4. Click the **Subfields** tab.
5. Highlight the row containing **Subfield a** (Uniform Title).
6. Double-click on the left-most column of that row.
7. Mark the **Is linking** box.
8. Save your changes.
9. Click **Cancel** twice.

9  Close the Cat Type form to have your changes take effect.

10 In the Table Editor, open the **bib_co_tag** (Bib Co-Tag Definitions) view. Horizon displays the List Bib Co-tag Definition window.

11 Do one of these options:
   - Double-click on the uniform title tag for which you want to set up or edit subfields.
   - If the uniform title tag you want does not exist, click **New**.
   Horizon displays an Edit Bib Co-tag Definition window:

   ![Edit Bib Co-tag Definition Window](image)

12 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Compound Tag</strong></td>
<td>Enter the number of the uniform title tag you want to use, or click <strong>Codes</strong> for a list of valid tags. (For example, for USMARC, enter “240” or “243”.)</td>
</tr>
<tr>
<td><strong>Co-Tag</strong></td>
<td>Enter “100”.</td>
</tr>
<tr>
<td><strong>Auth Tag</strong></td>
<td>Enter “100”.</td>
</tr>
<tr>
<td><strong>Authority</strong></td>
<td>Mark the <strong>Author</strong> option.</td>
</tr>
</tbody>
</table>
13 Enter this information in the **Compound Tag Subfields** group:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subfield</td>
<td>Enter “a”. This maps the subfield from the uniform title tag (compound tag) to the combined authority tag.</td>
</tr>
<tr>
<td>Rename To</td>
<td>Enter “t”. This renames subfield a on the authority record.</td>
</tr>
<tr>
<td>Must Exist</td>
<td>Mark this box if you want the subfield to exist in order for the mapping to occur.</td>
</tr>
</tbody>
</table>

14 Repeat step 13 as needed, adding other subfields that you want to map to the combined authority tag and renaming them as unused subfields.

15 If you want to, you can enter this information in the **Co-Tag Subfields** group:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subfield</td>
<td>Enter a subfield you want to map from the co-tag to the combined authority tag, or click <strong>Codes</strong> for a list of valid subfields.</td>
</tr>
<tr>
<td>Rename To</td>
<td>Enter the subfield as you want it renamed on the authority record.</td>
</tr>
<tr>
<td>Must Exist</td>
<td>Mark this box if you want the subfield to exist in order for the mapping to occur.</td>
</tr>
</tbody>
</table>

**NOTE**

Completing the Co-Tag Subfields group is optional. If you do not complete it, Horizon puts all authority-controlled subfields for the authority tag listed on page 1 of this window into the combined authority tag. However, if you complete one entry of this group, you must complete all entries that you want to appear in the combined authority tag.

16 Save your changes.

**Working with Linking Tags**

Horizon lets you group related bib records together by linking them. (For more information, see “Working with Linked Bib Records” in the “Bibliographic Records” chapter of the *Cataloging Guide.*) You set up the ability to link records in the Cataloging Type Linking Setup. (For more information, see “Setting Up or Changing Tag Linking” on page S-19.) You can do other tasks relating to linking bibs in the Table Editor.

This section explains these topics:

- Prohibiting Bib Record Links
Working with Linking Tags

- Using Keyword Inheritances
Prohibiting Bib Record Links

You can set up conditional MARC maps to prohibit linking certain bib records to other bib records. (For example, UniMARC standards do not allow a subseries linked bib record to also be a main series linked bib record.) You can set up a conditional MARC map so that Horizon cannot link a record to other records.

To prohibit linking, you must do these things:

- Create a conditional MARC map in the marc_map view. (For more information on how to create a conditional MARC map, see “Understanding Conditional MARC maps” in the “General Setup” chapter of the System Administration Guide.) Enter the MARC map you created in the Link-from Test MARC map and the Link-to Test MARC map fields of the link_tag view. If the condition you set is true, then the records can link. If it is false, then Horizon prohibits the records from linking.
- Make sure that the tags or subfields that you do not want to link are not set up in Syntax and Validation as linking tags or subfields. (For more information, see “Setting Up or Changing Valid MARC Record Components” on page S-4.)

NOTE

Prohibiting bib record links applies to UniMARC more than it does to USMARC, because UniMARC regulates where you can create links. Horizon contains default settings that conform to UniMARC standards.

Using Keyword Inheritances

Bib records “inherit” keywords from the bib records they are linked to. Because of keyword inheritances, users get a broader range of hits when they search for records in PAC or staff searching.
Working with Linking Tags

Here is an example of a multi-volume work. The keyword “architecture” is a hit for all of the records:

```
Bib 107
KW: Architecture

Bib 210
KW: Germany
(Architecture)

Bib 541
KW: Bavaria
(Architecture, Germany)

Bib 587
KW: Berlin
(Architecture, Germany)
```

**NOTE**

You can “turn off” the link search engine for a PAC flavor so that inherited keywords are not considered in keyword searches. You may want to do this if your searches take too much time. (For more information, see “Assigning a Search Mode to a PAC Flavor” in the “Searching Setup” chapter of the System Administration Guide.)

By default, only certain types of keywords are inherited. This is determined by the link class. You can make changes to the way keywords are inherited. Horizon narrows the number of inherited keyword hits by using link filters. You can assign different link filters to link classes.

This section explains these topics:

- Defining or Editing Inheritance Exceptions
- Assigning Link Filters

### Defining or Editing Inheritance Exceptions

Some link classes pass title, author, and subject keywords to bibs that are linked to them. Other classes pass only some keywords, or no keywords at all. (For example, the Bounded class does not pass any keywords, because the bib records in this class are not necessarily related to each other.)

Keywords that are prohibited from being passed on to linked bib records are called “inheritance exceptions.” These are the bib keywords that are inherited, or passed on, for each class (the link direction is the direction in which the keyword is passed):

<table>
<thead>
<tr>
<th>Link Class</th>
<th>Keywords Inherited</th>
<th>Link Direction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hierarchical</td>
<td>Title, Subject, Author</td>
<td>Down</td>
</tr>
<tr>
<td>Series</td>
<td>Title, Subject</td>
<td>Down</td>
</tr>
<tr>
<td>Supplement</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Chronological</td>
<td>Title</td>
<td>Both</td>
</tr>
<tr>
<td>Bound with</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Editions</td>
<td>Title, Subject, Author</td>
<td>Both</td>
</tr>
</tbody>
</table>
Using Keyword Inheritances

You can make Add or Edit inheritance exceptions in the Mq_index Inheritance Exceptions window.

To define or edit inheritance exceptions

<table>
<thead>
<tr>
<th>Link Class</th>
<th>Keywords Inherited</th>
<th>Link Direction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Translations</td>
<td>Title, Subject, Author</td>
<td>Both</td>
</tr>
<tr>
<td>Reproductions</td>
<td>Title, Subject, Author</td>
<td>Both</td>
</tr>
<tr>
<td>Reviews</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Unspecified</td>
<td>—</td>
<td>—</td>
</tr>
</tbody>
</table>

Assigning Link Filters

Because of keyword inheritances, a search can result in many more hits than the user wants to read. Horizon uses one of six filters to narrow the records that are hits. The user can then click on Related Subjects to view related titles that did not pass the filter.

Horizon uses these filters:

- **Hierarc2.** Selects the highest level record, or the one that is linked the furthest back, that meets the conditions of the search string.
- **HitFilt.** Selects only the records that meet the search string and at least one keyword directly.
- **MinFil.** Selects the record with the lowest bib record number that meets the conditions of the search string.

In this field | Do this
--- | ---
Mq Index | Enter the mq_index of the inheritance exception you want. (For example, if you want to create an inheritance exception for title keywords, enter the “bibkw” index.)
Link Class | Mark the appropriate option to specify the link class you want.
- **NoFilt.** Selects all records that meet the conditions of the search string.
- **PrHier2.** Selects the highest level record in a subtree with priority consideration.
- **PrHitF.** Selects only the records that meet the search string and at least one keyword directly, with priority consideration.

Horizon comes with one of these filters set up as a default for each link class. The default filter for all hierarchical type links (hierarchical, series, and supplement classes) is “hierarc2.” The default filter for all other links is “hitfilt.” You can override the default filters in the search_link_class_filter view. If this view is empty, Horizon is using the defaults as described.

Some bib records may be linked together using different classes. Horizon considers each class in a linked bib structure for hits in PAC or staff searching. This is called “priority filtering.”

For example, this structure contains a main record linked to a multivolume work using the hierarchical link class. Each title in the multivolume work is linked to a German translation using the Translation class. Both the Hierarchical link class and Translation link class are considered for hits in searches against your database:

Priority filters narrow search results by limiting what classes are considered for hits. A priority filter lets you order the classes you want considered for hits. When one class yields hits, Horizon stops searching the others for hits. This is called “priority consideration.”

This table shows examples of searches using standard filters and priority filters on the previous linked bib structure (the prefix “pr” denotes a priority filter):

<table>
<thead>
<tr>
<th>Keyword Search String</th>
<th>Link Classes</th>
<th>Filter</th>
<th>Priority of Classes</th>
<th>Resulting Hits</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Drama”</td>
<td>Hierarchical Translations</td>
<td>Hierarc2 hitfilt</td>
<td>NA</td>
<td>W.Shakespeare</td>
</tr>
</tbody>
</table>
Using Keyword Inheritances

<table>
<thead>
<tr>
<th>Keyword Search String</th>
<th>Link Classes</th>
<th>Filter</th>
<th>Priority of Classes</th>
<th>Resulting Hits</th>
</tr>
</thead>
<tbody>
<tr>
<td>“W.Shakespeare”</td>
<td>Hierarchical</td>
<td>hierarch2</td>
<td>Hierarchical</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Translations</td>
<td>hitfilt</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“W.Shakespeare and drama”</td>
<td>Hierarchical</td>
<td>prhierarchical</td>
<td>1. Hierarchical</td>
<td>W.Shakespeare</td>
</tr>
<tr>
<td></td>
<td>Translations</td>
<td>prhitfilt</td>
<td>2. Translations</td>
<td>NA</td>
</tr>
</tbody>
</table>

Each of these search strings deals with the Hierarchical and Translations link classes, because they are the two classes in the linked bib structure. The first search uses the default filters for these classes (hierarc2 and hitfilt). Because these are standard filters, the priority each class receives is not applicable. The hierarchical filter yields “W. Shakespeare” as a resulting hit, and the “hitfilter” yields the English version of the plays.

The second search uses the priority filters. The translations link class is prioritized before the Hierarchical class. The prhitfilter yields the English plays as resulting hits, and so the second filter is not considered.

You use the same view to assign priority or non-priority filters.

**To assign link filters**

**View:** search_link_class_filter

<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 for the search type to which you want to assign a filter.</td>
</tr>
</tbody>
</table>
| Link class          | Mark the type of link class to which you want to assign a filter.  
(For more information on link classes, see “Working with Linked Bib Records” in the “Bibliographic Records” chapter of the Cataloging Guide.) |
| search filter       | Enter the code for the search filter you want to assign, or click Codes for a list of valid codes.  
Priority filters begin with the letters “Pr”. |
Setting Up Batch Item Delete

Batch Item Delete lets you delete from your library database a group of item records that you no longer want. You can set default parameters for item deletion, including special processing and mapping information for bibliographic data that you want to save. Library staff can use this process only if you grant them access rights through Horizon Security. (For information about using Batch Item Delete, see “Deleting Multiple Item Records” in the “Item and Copy Records” chapter of the Cataloging User’s Guide.)

NOTE

Some of the defaults that you set apply to any item record deleted in Cataloging. However, they do not apply to the deletion of a fast-added item at Circulation checkin or to the deletion of an item when it is withdrawn from Reserve Bookroom.

This section explains these topics:

- Letting Staff Use Batch Item Delete
- Defining a Source Catalog Code
- Setting Up Item Delete Options
- Understanding the Output File
- Understanding the Item Delete Discard Tables
- Setting Up Display Columns for the Report and Purge Discarded Items Process

Letting Staff Use Batch Item Delete

Before staff can use any of the Batch Item Delete features or change its options, you must manage security in both the Role and Passkey areas of Horizon Security.

You use the Role Manager to permit access to these Launcher processes and options:

- Item Delete Options
- Batch Item Delete
- Report and Purge Discarded Items
- Whether a staff member can delete a bib record when the item deleted is the last item linked to the bib (on the Cataloging tab)

You use the Pass Key Manager to permit access to these features:

- The library code view. You set up staff access by adding Library Code to Views Allowed.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>priority</td>
<td>If you chose a priority filter (a filter beginning with Pr), enter a number that indicates the order in which you want Horizon to consider the filter. Horizon checks the filter with the lowest priority number first.</td>
</tr>
</tbody>
</table>
Defining a Source Catalog Code

If you want to, you can identify sources from which your library obtains cataloging records. You can also identify the union catalog that tracks which libraries hold copies of a bibliographic record. The Batch Item Delete process can use this code to specify the file format that it uses when it creates an output file. If Horizon created the item during bib import and you specified a source catalog code on the import source, Batch Item Delete also saves this code when you save deleted information.

**To define a source catalog code**

1. Open the `source_catalog` view in the Table Editor.
2. Click New.
3. Complete these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source Catalog</td>
<td>Enter “PLAIN”. This is the code of the source catalog you are defining for Batch Item Delete.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description that can help you identify the source catalog.</td>
</tr>
</tbody>
</table>

4. Save your changes.

Setting Up Item Delete Options

You can set system-wide defaults that define how Horizon processes information when you delete item records. You can also define the MARC maps that Horizon uses to extract the bibliographic data it saves. If you want to, you can specify additional information that you want Horizon to save.

You can set these defaults that affect item deletion in Horizon Cataloging:

- Whether to save information about the item records that you delete. If you choose to have Horizon save information about discarded items, Horizon stores each discarded item’s data in the discard tables whether the item is deleted from the List Items for Bib window in Cataloging or from Batch Item Delete.
- If you save information, what bibliographic data Horizon should save along with the discarded item data.
• If you save information, what MARC tag is used to store your library’s control number (usually either the 001 or 035 tag).

You may need to open the marc_map view in the Table Editor and either add a new MARC map or edit an existing one to specify where the library control number is stored. (For example, you may need to add a MARC map specifying whether your library control number is in the 001 or 035 tag.)

You can set these additional options that apply only to Batch Item Delete:

• If the last item record attached to a bib record has been deleted, whether to delete the bib record also or flag the bib record as staff only.
• Whether to create an output file when a batch is deleted. If you use a union catalog, you can use this file to update the union catalog regarding discarded holdings.
• The output file format.
• A library code for the output file. You set up this code in the library_code view in the Table Editor.

The Batch Item Delete process lets you delete most items that are linked to copy records. However, Horizon does not delete the related bib record if a copy record is still linked to the bib, even though it deletes the item record.

**IMPORTANT**

When you delete serial items, Horizon does not automatically update the Summary of Holdings.

This section explains these topics:

• Using the Item Delete Options Process
• Specifying Deleted Item MARC Data to Save

**Using the Item Delete Options Process**

You set option defaults for deleting items in a single view. Library staff can override these defaults if you give them the rights to do so.

**To use the Item Delete Options process**

1. Open the item_delete_options view in the Table Editor, or start the Item Delete Options process. The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
2. Double-click the option file.
Horizon displays the Edit Item Delete Options window:

3 Complete or update these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Item Delete Action</td>
<td>Mark one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want to leave the bib record in the database with its current status, mark <strong>No Action</strong>.</td>
</tr>
<tr>
<td></td>
<td>• If you want to delete a bib record whose last item record is deleted, mark <strong>Delete bib</strong>.</td>
</tr>
<tr>
<td></td>
<td>• If you want to flag as Staff Only a bib record whose last item record is deleted, mark <strong>Flag bib as staff only</strong>.</td>
</tr>
<tr>
<td>Create output file</td>
<td>If you want Horizon to generate a file containing information about the deleted records, mark this box.</td>
</tr>
<tr>
<td></td>
<td>If you mark this box, you also need to verify or edit the information in the Library code and Output format fields.</td>
</tr>
<tr>
<td>Library code</td>
<td>Enter or choose the identifying code for your library.</td>
</tr>
<tr>
<td></td>
<td>This code helps the recipient of the output file determine which library sent the file. If any staff member who creates an output file plans to append new information to an existing file, the library identifying codes must match.</td>
</tr>
<tr>
<td>In this field</td>
<td>Do this</td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Output format</td>
<td>Enter or choose the type of file encoding that you want to use. There is currently only one valid code that generates an output file (PLAIN). You must set up the code before you or staff members can choose it. (For instructions, see “Defining a Source Catalog Code” on page S-59.)</td>
</tr>
<tr>
<td>Save deleted items to discard</td>
<td>If you want Horizon to save information about your deleted records in the database, mark this box. If you mark this box, you should also choose MARC maps from which Horizon should extract bib information to save. Information stored in the database retains the original barcode and status of the deleted items.</td>
</tr>
<tr>
<td>Title MARC map</td>
<td>Enter or choose the MARC map from which you want Horizon to extract deleted items’ titles.</td>
</tr>
<tr>
<td>Author MARC map</td>
<td>Enter or choose the MARC map from which you want Horizon to extract deleted items’ authors.</td>
</tr>
<tr>
<td>PubDate MARC map</td>
<td>Enter or choose the MARC map from which you want Horizon to extract deleted items’ publication dates.</td>
</tr>
<tr>
<td>LCCN MARC map</td>
<td>Enter or choose the MARC map from which you want Horizon to extract deleted items’ LCCNs.</td>
</tr>
<tr>
<td>ISBN MARC map</td>
<td>Enter or choose the MARC map from which you want Horizon to extract deleted items’ ISBNs.</td>
</tr>
<tr>
<td>Library Ctrl No. MARC map</td>
<td>Enter or choose the MARC map from which you want Horizon to extract deleted items’ library control numbers. If a MARC map for your library control number does not exist, you can create it. (For instructions, see “Changing or Creating a MARC Map” in the “MARC Maps” section of the “General Setup” chapter of the System Administration Guide.)</td>
</tr>
</tbody>
</table>

4 Save your changes.
Specifying Deleted Item MARC Data to Save

Horizon provides two columns that you can use to specify additional MARC data to include when you save information about discarded items. You can set up one or both of these columns.

To specify deleted item MARC data to save

1. Do these steps to set up the MARC map from which you want to extract information:

   1. Open the `mq_view` view in the Table Editor, or start the View Control process.
   2. Open the `item_delete_options` view.
      
      The default location for this process is the `Administration\System Setup` folder on the navigation bar.
   3. Page down to display the List View.
   4. Use the drop-down list to choose the `local1_marc_map` column.
   5. In the Column Label field, enter a name for the `local1_marc_map` column.
      
      This label should describe the information that you want to display.
   6. If you want the MARC map data to display on the Item Delete Options window, mark the Displayed property.
   7. Add the column to the Edit view.
      
      (For instructions, see “Adding a Column to a Search List View or Edit Window” in the “Reconfiguring List and Edit Windows” section of the “Introduction to Horizon Views” chapter of the `System Administration Guide`.)
   8. Save your changes.

2. If you want to include the locally-defined data on the Report and Purge Discarded Items window, do these steps:

   1. Open the `mq_view` view in the Table Editor, or start the View Control process.
   2. Open the `discarded_item` view.
   3. Page down to display the List View.
   4. Use the drop-down list to choose the `local1` column.
   5. In the Column Label field, enter the name for the `local1` column that you specified in the `item_delete_options` view.
   6. If you want the MARC map data to display on the Report and Purge window, mark the Displayed property.
   7. Save your changes.

3. If you want to add more local data, repeat steps 1 and 2 for the `local2_marc_map` and `local2` columns.
Understanding the Output File

You or your library staff can create an output file when a batch of item records is deleted using Batch Item Delete. Then you can send this file to interested parties. (For example, if your library uses a union catalog, you can send this file to whoever updates the union catalog.) The supported format is driven by the Public Libraries Automated Information Network (PLAIN), and consists of the library code, followed by a carriage return, then the item barcodes of the deleted items, each followed by a carriage return.

Understanding the Item Delete Discard Tables

If you choose to save deleted item data, Horizon stores the information in these tables:

- discard_item
- discard_item_additional

Horizon writes item and bib record information to these tables depending on your specifications in the Batch Item Delete Options process. Horizon records information such as whether this is the last item to be deleted for this location or for the system. It also records whether the associated bib has been deleted. You can review and purge the saved information using standard Table Editor functionality.

You can give staff members the rights to override your Batch Item Delete Options for each discard session. You can also give them the rights to review and purge the saved information.

NOTE

These options apply to item records deleted in Cataloging. They do not apply to the deletion of a fast-added item at Circulation checkin or to the deletion of an item when it is withdrawn from Reserve Bookroom.
The discard_item table includes all the information from the item table.

The discard_item_additional table includes this information:

- The source catalog code from the item_activity table.
- The item number.
- Whether the item is the last copy for the location.
- Whether the item is the last copy for the system.
- Whether the bib record was also deleted.
- The user ID of the library staff member who discarded the item and deleted the item record.
- The date the items were deleted.

If you specify MARC maps from which Horizon should extract information in Item Delete Options, Horizon can also include this information in the discarded items tables:

- The title of the item.
- The author of the item.
- The item’s publication date.
- The item’s LCCN, if appropriate.
- The item’s ISBN, if appropriate.
- A library-designated control number.
- Information you specify. (For more information, see “Specifying Deleted Item MARC Data to Save” on page S-63.)

Setting Up Display Columns for the Report and Purge Discarded Items Process

The Report and Purge Discarded Items process lets library staff view, print, and export some of the data that Horizon stores if you choose to save information about deleted item records. You can set up default display columns for the Report and Purge Discarded Items process. You can choose column headings for the report, including headings for columns that are locally defined. (For more information about locally defined columns, see “Specifying Deleted Item MARC Data to Save” on page S-63.) Library staff can use this process only if you grant them access rights through Horizon Security.

To set up display columns for the Report and Purge Discarded Items process

1. Open the mq_view view in the Table Editor, or start the View Control process.
2. Open the discarded_item view.
   The default location for this process is the Administration\System Setup folder on the navigation bar.
3 Replace the List window to display the columns that you want with the column headings that you want.
(For instructions, see “Reconfiguring List and Edit Windows” in the “Introduction to Horizon Views” chapter of the System Administration Guide.)

4 Save your changes.

Setting Up Modulus 10 Item Barcode Verification

Horizon can recognize 8 digit modulus 10 barcodes with a double-add-double check digit formula. You need to set up Horizon to accept this barcode format.

To set up modulus 10 item barcode verification

1 Open the \texttt{mq\_view} view in the Table Editor, or start the View Control process.
2 Open the \texttt{item} \texttt{mq\_view}.
3 Display the Column Types group.
4 Use the drop-down list to choose the \texttt{ibarcode} column type:

5 In the Key String Type field, enter “8M10B”.
6 Save your changes.
7 Open the location view in the Table Editor.
8 Choose the location for whose database you want to enter barcodes.
Horizon displays the Edit Location Parameters window for that location:

9  Do one of these options in the **Item Barcode Length** field:
   
   - If you want to always enter full item barcodes, leave the field empty.
   - If you want to be able to enter either full item barcodes or only significant digits, enter “8”.

10  Save your changes.

11  Restart the Horizon client software.
Setting Up Import Source Parameters

Importing is the process of transferring MARC records into Horizon. When your library imports records, you must specify how Horizon should process the incoming records. Here is a list of processing parameters you can set:

- **General Import Source Parameters.** These determine things such as deciding whether Horizon should create item records at import, choosing a default ownership, assigning statuses to new bibs and authorities, and indicating whether new records can be viewed by staff only. You can also specify whether to keep existing tags when Horizon replaces existing records.

- **Tag Action Parameters.** These determine things such as whether specific tags and subfields are renamed or deleted, or how to rename tag prefixes and suffixes.

- **Match Points Parameters.** These determine the values Horizon uses to compare existing bib and authority records in your database with records that are being imported. These parameters also let you choose the kind of linkage imported authority records should have.

- **Link Match Points Parameters.** These determine the information Horizon uses to identify records to overlay. You can also choose to use Link Match Points for bib-to-bib linking if you set this feature up in Customize MARC Editor. (For more information, see “Changing Profile Options” in the “Customizing the MARC Editor” chapter of the Cataloging Guide.)

- **Prefix Change Parameters.** These determine whether Horizon adds a default prefix or replaces one with another specified prefix.

- **Item Creation Parameters.** These determine things such as which columns Horizon uses to create item information, and the match points used to determine whether imported item records replace existing item records.

A set of processing parameters defines an import source. Most parameters are optional; however, Horizon requires a new import source to have at least one Item Column defined. You can have multiple import sources, including at least one for each provider from which you obtain MARC records.

The Authority Loader works as part of the regular record import process. It lets you specify normalization rules so that Horizon can make better matches during record import. It lets you choose to replace or merge newly imported and existing records, and set other rules that specify how Horizon handles imported authority records.
Your library staff specifies an import source in the Multi-Format Import window of the Import process each time they import records:

![Multi-Format Import Window](image)

Catalogers can enter the Import Source code, or click Codes to choose from a list of valid codes.

If you set up import parameters and link them to an import source, Horizon uses those parameters as soon as the importer enters the import source code in this window. Your library staff can override some of these parameters. They can also set parameters that determine whether Horizon replaces existing MARC records (bib, authority, and item) when new records match the existing ones (record overlay), and under what circumstances replacement can occur. (For more information, see “Importing Records” in the “Importing and Exporting Records” chapter of the Cataloging Guide.)

**Before You Begin**

Determine this information to set up import parameters:

- The different sources from which your library receives records.
- The fields you want Horizon to use as match points on incoming records.
- The indexes Horizon uses for matching.
- If you use USMARC, any prefix changes in the 001 tags of records received from each source. (Potentially, you could have one change per source, but not every source will need this change.)
- The import filter program if your library receives non-MARC records.
- The tags from which Horizon creates items.
- The columns in the item table where Horizon stores information extracted from the item tag.
- Any default values you want to use for the item column when the item tag does not contain the necessary information.
- The tag numbers in existing bib and authority records that contain information you want to preserve if the records get replaced (overlaid) by newly imported records.

This section explains these topics:

- Setting Up General Import Source Parameters for Bib and Authority Records
Setting Up Import Source Parameters

- Defining Translation Values
- Setting Up Tag Action
- Setting Up Multiple Tag Matching
- Setting Up Bib and Authority Match Points
- Setting Up Link Match Points
- Setting Up Prefix Changes
- Setting Up Item Creation Parameters
- Setting Up Bib Tag Preservation
- Using the Authority Loader

Setting Up General Import Source Parameters for Bib and Authority Records

An import source determines the rules by which Horizon processes incoming records. You must have at least one import source set up if your library plans to import MARC records. You can define multiple sets of rules for each provider from which you obtain MARC records. In fact, since you can only define one tag at a time from which to process data for each source, providers using a different prefix for authority and bib records require two sets of import source parameters: one for authority records and one for bib records.

When you import authority records that contain See Also (USMARC 5XX) and See (USMARC 4XX) tags, Horizon follows certain rules by default:

- If you import an authority record with a See Also tag and it matches an existing invalid heading, Horizon changes the See Also tag to a See tag.
- If you import an authority record with a See tag and it matches an existing valid heading, Horizon changes the See tag to a See Also tag.
  
  If you import a record with a See tag and it matches an existing valid system-created record, Horizon changes the valid record to invalid and links any existing bib records to the newly imported authority record.

Horizon logs these changes in the bib_auth_invalid_audit table.

You can change the default so that Horizon preserves incoming or existing authority records, even if there are existing headings that conflict with the incoming See or See Also tags. (For instructions, see “System-Wide Settings” in the “General Setup” chapter of the System Administration Guide.)

**NOTE**

Changing the default is a system-wide change that affects all import sources.

Library staff reviews records in the Data Load Error Log window. (For more information, see “Resolving an Import Error” in the “Importing and Exporting Records” chapter of the Cataloging Guide.)
To set up general import source parameters for bib and authority records

1. Open the import_source view in the Table Editor, or start the Import Sources process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.

2. Choose the import source you want to change, or create a new import source.
   Horizon displays the Edit Import Source window:

   ![Edit Import Source window](image)

3. Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Source</td>
<td>Enter a code that identifies the provider of the records in this field. Import sources could include OCLC, RLIN, and ISM.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the source. (For example, enter “OCLC Authorities” or “OCLC Bibliographies”.)</td>
</tr>
</tbody>
</table>
### Setting Up Import Source Parameters

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Items</td>
<td>Choose one of these options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>No.</strong> Choose this option to have Horizon <em>not</em> create item records.</td>
</tr>
<tr>
<td></td>
<td>• <strong>For New Bibs Only.</strong> Choose this option to have Horizon create item records for new bibs only.</td>
</tr>
<tr>
<td></td>
<td>• <strong>For New or Matched Bibs.</strong> Choose this option to have Horizon create item records for new bibs or while preserving your existing bib record for the title.</td>
</tr>
<tr>
<td></td>
<td>Vendors sometimes ship brief bib records that can serve as placeholders to remind cataloging staff to enter a full bib. These brief bib records may also contain embedded item information. If a brief bib record replaces an existing full bib record, the embedded item information in the brief bib overwrites any item information that may have been part of the full bib. However, cataloging staff must reconstruct the full bib record manually. In order to import embedded item information without overlaying an existing bib record, you must set your import source parameters so that Horizon knows whether to create new item records for just new bibs or for both new and matched bibs. (For more information, see “Overlay Options” in the “Importing and Exporting Records” chapter of the Cataloging Guide.)</td>
</tr>
<tr>
<td>Item Tag</td>
<td>Enter the bib record tag from which Horizon extracts item information when it creates item records for imported titles. (For example, item information is often contained in the 949 tag.) If you do not want to use the import source you are creating or editing for item creation, leave this field blank.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>If your library does not store item information in bib records but still wants to create an item record for each bib record, enter a tag number that is present in every bib record you import, such as 049.</td>
</tr>
<tr>
<td>Filter Program</td>
<td>Enter the filter program you want to use if you are importing non-MARC records.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>Contact Horizon Customer Support if you want to import non-MARC records.</td>
</tr>
<tr>
<td>Filter Arguments</td>
<td>Enter arguments for importing non-MARC records.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong></td>
</tr>
<tr>
<td></td>
<td>Contact Horizon Customer Support if you want to import non-MARC records.</td>
</tr>
</tbody>
</table>
### Setting Up General Import Source Parameters for Bib and Authority Records

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Charset</td>
<td>If the records you are importing use a code page instead of an ALA character set, enter the code page.</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> For Horizon to read the code page, it must be defined for the workstation you are using.</td>
</tr>
<tr>
<td>Default Owner</td>
<td>Enter or choose the code for the owner for the records you are importing.</td>
</tr>
<tr>
<td></td>
<td>(For more information on record ownership, see “Securing Horizon” in the “Security and Preferences” chapter of the <em>System Administration Guide</em>.)</td>
</tr>
<tr>
<td>Status for New Bibs</td>
<td>Enter or choose the code for the status code assigned to new incoming bibs.</td>
</tr>
<tr>
<td></td>
<td>(For instructions on setting up bib record statuses, see “Setting Up Item Creation Parameters” on page S-86.)</td>
</tr>
<tr>
<td>Status for New Auths</td>
<td>Enter or choose the code for the status code assigned to new incoming authority records.</td>
</tr>
<tr>
<td></td>
<td>(For instructions on setting up authority record statuses, see “Setting Up Item Creation Parameters” on page S-86.)</td>
</tr>
<tr>
<td>Staff-Only for New Bibs</td>
<td>Mark this box if only staff can view new bib records.</td>
</tr>
<tr>
<td>Staff-Only for New Auths</td>
<td>Mark this box if only staff can view new authority records.</td>
</tr>
</tbody>
</table>

4. Click **Page Down** or resize the window to display these general authority parameters:
5 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match Point match is required for auth delete</td>
<td>If you want to require a match against your match points before Horizon can delete a record, mark this box.</td>
</tr>
</tbody>
</table>
| Match Point match is sufficient for auth delete    | If you want Horizon to delete a record if finding an existing matching record based on a match point is enough to identify that record as a match, mark this box.  
   If Horizon does not find a matching record based on a match point, Horizon uses extra checking to keep searching. (Extra checking involves such things as matching the main heading, the scheme, or use codes.) |
| All auth deletes go to manual review w/o deleting  | If you want to send all records with a “delete” status to the Error Log without actually deleting the records, mark this box.                                                                          |
| Match Point match is sufficient for auth replace   | If you want Horizon to overlay or merge an existing record if matching based on a match point is enough to identify that record as a match, mark this box.  
   If Horizon does not find a matching record based on a match point, Horizon uses extra checking to keep searching. (Extra checking involves such things as matching the main heading, the scheme, or use codes.) |
| Overlay Invalid to Valid if no main heading        | If you want Horizon to look for a 4xx to 1xx match if the main heading (1xx) of the incoming record does not match an existing 1xx or 4xx heading, mark this box.  
   Only 4xx headings coded as Earlier Established Form on the incoming record will be used to check for a match. |
| Undifferentiated Pers. Names go to manual review    | If you want to send a matched record that is an Undifferentiated Personal Name to the Error Log, mark this box.                                                                                           |
| Complex Reference Note auths go to manual review   | If you want to send a matched record that has a Complex Reference Note to the Error Log, mark this box.                                                                                             |
6 Click **Page Down** or resize the window to display **Auth Link Type**:

![Auth Link Type](image)

7 Mark the option to choose the kind of authority linkage you want authority records to use on import.

8 Save your changes.

---

**Defining Translation Values**

If you want to, you can change a specified text in a subfield to a different specified text when you import records. To do this, you need to define the translation values you want to use for a specific import source, and then activate translation. You can define translation values for bib (import_tag_action view) or authority tags (import_auth_tag_action view).

**To define translation values**

<table>
<thead>
<tr>
<th>View</th>
<th>import_auth_tag_action or import_tag_action</th>
</tr>
</thead>
</table>
### In this field | Do this
--- | ---
Import Source | Enter or choose the code for the import source for which you are setting up import action.
Tag | Enter the tag number for which you want to set up import action.
ord | Enter a number to indicate the order in which the action you are describing should occur.
(For example, if you want to translate tag 949 subfield a and then rename tag 949 subfield a to tag 911 subfield n, enter “5” here and “10” in the ord field of a tag action view defining the renaming task.)
Subfield | Enter the subfield identifier.
Do After Item Creation (bib import action only) | Mark this box if the action should occur after item creation.
Conditionally | Mark this box if you want import action to take place if certain criteria based on indicator values are met.
If you do not want import action to be conditional, do not mark this box and skip to the Tag Action field.
Indicator | If you want import action to be conditional, mark the button for the indicator you want Horizon to check against.

**NOTE**
You cannot unmark both indicator options. However, these marks only affect import action if you have also marked the Conditionally box.

You use these fields when you set up tag action. (For more information, see “Setting Up Tag Action” on page S-78.)
Defining Translation Values

To activate translation

1. Open the import_source view in the Table Editor, or start the Import Sources process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
2. Choose the import source you want to change, or create a new import source.
   Horizon displays the Edit Import Source window.
3. Click Page Down or resize the window to display the Bib Tag Action or AuthTag Action group you want to work with.
4. In the Tag Action field, mark Translate Subfield to change the text in the subfield to what you specified in the Translation Values group of the import_tag_action or import_auth_tag_action view.
   (For more information on tag action, see “Setting Up Tag Action” on page S-78.)
5. Save the file.

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relation</td>
<td>If you want import action to be conditional, do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• Mark the Equal option if you want the value of the indicator you marked to be equal to the value you enter in the Value field.</td>
</tr>
<tr>
<td></td>
<td>• Mark the Not Equal option if you want the value of the indicator you marked to be unequal to the value you enter in the Value field.</td>
</tr>
<tr>
<td>Value</td>
<td>If you want import action to be conditional, enter the value for the indicator you want Horizon to check against.</td>
</tr>
<tr>
<td></td>
<td>(For example, “indicator 1 = 12345” will cause the import action to take place if indicator 1 has the value of 1, 2, 3, 4, or 5.) An underscore is used to indicate a space.</td>
</tr>
<tr>
<td>Tag Action</td>
<td>Mark Translate Subfield to change the text in the subfield to what you specify in the Translation Values group.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In this field in the Translation Values group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-Value</td>
<td>Enter the value or text from the imported records that you want to translate.</td>
</tr>
<tr>
<td>Out-Value</td>
<td>1 Enter the value or text to which you want the in-value to change.</td>
</tr>
<tr>
<td></td>
<td>2 Click New and complete the In-Value and Out-Value fields for any other translated values that you want translated for this subfield.</td>
</tr>
</tbody>
</table>
Setting Up Tag Action

When your library imports records, you can choose to delete or rename tags and subfields in incoming MARC records. This eliminates having to edit many of the records before or after import. (For example, you can specify that the item tag 949 is renamed to tag 839 upon import.) You can rename or delete tags before or after item creation, if Horizon is creating items during import. You can also choose to translate existing subfield text into text you define. (For instructions, see “Defining Translation Values” on page S-75.)

Before You Begin

Create an import source before you specify tag action. Tag action is connected to an import source. Tag action occurs before Horizon checks for matches in your database with incoming records. Consequently, set up your match points as tags that are neither renamed nor deleted.

To set up tag action

1 Open the import source view in the Table Editor, or start the Import Sources process. The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.

2 Choose the import source you want to change, or create a new import source. Horizon displays the Edit Import Source window.

3 Click Page Down or resize the window to display the Bib Tag Action or AuthTag Action group you want to set up:

![Edit Import Source Window](image)

4 Complete or update these fields in the group:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag</td>
<td>If you are renaming or deleting a tag, enter the tag number.</td>
</tr>
<tr>
<td>Subfield</td>
<td>If you are renaming or deleting a subfield, enter the subfield number.</td>
</tr>
<tr>
<td>Do After Item Creation (bib tag action only)</td>
<td>Mark this box if the action should occur after item creation.</td>
</tr>
</tbody>
</table>
### Setting Up Tag Action

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conditionally</td>
<td>Mark this box if you want tag action to take place if certain criteria based on indicator values are met. If you do not want tag action to be conditional, do not mark this box and skip to the Tag Action field.</td>
</tr>
</tbody>
</table>
| Indicator | If you want tag action to be conditional, mark the button for the indicator you want Horizon to check against.  
**NOTE**  
You cannot unmark both indicator options. However, these marks affect tag action only if you have also marked the Conditionally box. |
| Relation | If you want tag action to be conditional, do one of these options:  
- Mark the **Equal** option if you want the value of the indicator you marked to be equal to the value you enter in the Value field.  
- Mark the **Not Equal** option if you want the value of the indicator you marked to be unequal to the value you enter in the Value field. |
| Value | If you want tag action to be conditional, enter the value for the indicator you want Horizon to check against.  
(For example, “indicator 1 = 12345” will cause the tag action to take place if indicator 1 has the value of 1, 2, 3, 4, or 5.) An underscore is used to indicate a space. |
| Tag Action | Do one of these options:  
- Mark **Rename Tag** to change the tag number to the number you specify in the Rename Tag To field.  
- Mark **Delete Tag** to remove the tag from the record on import. If you mark this button, you do not need to enter information in the remaining fields.  
- Mark **Translate Subfield** to change the text in the subfield to what you specified in the Translation Values group of the import_tag_action or import_auth_tag_action view. (For instructions, see “Defining Translation Values” on page S-75.) |
### Setting Up Import Source Parameters

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rename Tag To</td>
<td>Enter the new tag number to which you want the original changed.</td>
</tr>
<tr>
<td>Rename Subfield To</td>
<td>Enter the new subfield value to which you want the original changed.</td>
</tr>
<tr>
<td>Rename Prefix</td>
<td>If you marked Rename Tag in the Tag Action field, enter any information you want to display before the text already contained in the tag. (For example, for the 001 tag, you could enter “(RLIN)”. This would display before the control number to identify the organization from which you obtained the record.)</td>
</tr>
<tr>
<td>Rename Suffix</td>
<td>If you marked Rename Tag in the Tag Action field, enter any information you want to appear after the text already contained in the tag. (For example, for the 001 tag, you could enter “(OCLC)”. This would display after the control number to identify the organization from which you obtained the record.)</td>
</tr>
</tbody>
</table>

5  Save your changes.

6  Repeat steps 3 through 5 for every tag for which you want to set up a tag action.

7  Continue with “Setting Up Bib and Authority Match Points” on page S-81.

### Setting Up Multiple Tag Matching

When importing bib or auth records, if there are multiple tags for the matching index on the incoming record, only the first tag is used for matching. You can match on more than one tag by adding the “/V” switch to the import process. (For example, you can choose to match on the second ISBN.)

**To match on more than one tag**

1  Click the Cataloging launcher, then right-click on Export and select Customize Navigation Bar.

2  In the Arguments field, enter “/v”.

3  Click OK to save your changes.
Setting Up Bib and Authority Match Points

Incoming records that match existing records can replace the existing records. Replacing records is referred to as “overlay.” Overlay occurs only in these cases:

- When the overlay option is flagged during import.
- When information in incoming records matches specified information in existing records.

A match point is a field that Horizon checks for duplicate information between incoming and existing records. Match points should be tags or fields that contain information unique to a record. (For example, the tag containing the OCLC record number, tags used in the OCLC index set up in the mq_index, or tags containing the ISBN or ISSN number would make good match points.) You can set up multiple match points for bib records and for authority records. Match points may differ for different sources.

For example, the match point for bib records might be the index that points to bib source control numbers stored in the 035 tag. When Horizon finds two bib records with the same source control number, it makes a match. The incoming record replaces the existing one, if the overlay option is chosen.

You can set up bib and authority match points based on these things:

- **Horizon indexes.** (For example, you could use the LCCN for bib or author authority records.) Indexes reference specific tags in MARC maps. Any index used as a match point must be built from the correct table. (For example, bibliographic indexes must be built from the Bib table and authority indexes must be built from the Auth table.)

*WARNING*
You cannot use alphabetical or keyword indexes as match points for either bib or authority records. You must use exact match indexes.

- **Specific tags and subfields that contain the bib or authority record’s Horizon number.** (For example, a match point for bib records might be based on tag 955 subfield a, which contains the Horizon bib record number.)

To set up bib and authority match points

1. Open the import_source view in the Table Editor, or start the Import Sources process.
   The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
2. Choose the import source you want to change, or create a new import source.
   Horizon opens an Edit Import Source window.
3 Click Page Down or resize the window to display the Bib Match Points or Auth Match Points group you want to set up:

![Edit Import Source](image)

4 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ord</td>
<td>Enter the order number in which you want Horizon to check the match point you are working with. Horizon checks the lowest order number first.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE**

If you assign ord numbers in increments of ten, you leave numbers available for assigning to additional match points in the future or for reordering existing ones.

- **Mark Type**
  - Do one of these options:
    - If you want to use an index for your match, mark Match based on Horizon Index. This option checks information referenced in the MARC map linked to the index.
    - If you want to use a Horizon bib number for your match, mark Match based on Horizon Bib#. This option checks the Horizon-assigned by record number stored in a specific tag’s subfield.

<table>
<thead>
<tr>
<th>mq index</th>
<th>If you selected the match type based on a Horizon index, enter the mq_index you want to use.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag where Bib# is found</td>
<td>If you selected the match type based on a Horizon bib number, enter the tag that stores the record number.</td>
</tr>
<tr>
<td>Subfield where Bib# is found</td>
<td>If you selected the match type based on a Horizon bib number, enter the subfield from the tag you entered that stores the record number.</td>
</tr>
</tbody>
</table>

5 Repeat step 4 for each additional match point that you want to use for either bibs or authorities.

6 Save your changes.
If your library links bib records, continue with “Setting Up Link Match Points;” otherwise, skip to “Setting Up Prefix Changes” on page S-84.

Setting Up Link Match Points

Link match points compare fields in incoming link bib records with fields in existing link bib records. When a match occurs, Horizon overlays the existing link bib record with the incoming bib record.

To set up link match points

1. Open the import_source view in the Table Editor, or start the Import Sources process. The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
2. Choose the import source you want to change, or create a new import source. Horizon opens an Edit Import Source window.
3. Click Page Down or resize the window to display the Link Match Points group:

4. Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ord</td>
<td>Enter the order number in which you want Horizon to check the match point you are working with. <strong>NOTE:</strong> If you assign ord numbers in increments of ten, you leave numbers available for assigning to additional match points in the future or for reordering existing ones.</td>
</tr>
</tbody>
</table>
| MARC map      | Enter the MARC map you want to use to extract link bib information. Choose from one of these MARC maps:  
  - lnkmatw. This matches on the record control number.  
  - lnkmatx. This matches on the ISSN number.  
  - lnkmatz. This matches on the ISBN number, excluding tags 760, 762, and 777. |
Setting Up Import Source Parameters

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mq Index</td>
<td>Enter the mq_index you want to use to look up the link bib. (For example, if you are matching on the ISSN number, use an ISSN mq index.)</td>
</tr>
<tr>
<td>Match Type</td>
<td>Do one of these options:</td>
</tr>
<tr>
<td></td>
<td>• If you want to use an index for your match, mark <strong>Match based on Horizon Index</strong>. This option checks information referenced in the MARC map linked to the index.</td>
</tr>
<tr>
<td></td>
<td>• If you want to use a Horizon bib number for your match, mark <strong>Match based on Horizon Bib#</strong>. This option checks the Horizon-assigned by record number stored in a specific tag’s subfield.</td>
</tr>
<tr>
<td>Process Prefix</td>
<td>If you want any prefix defined for a link match point to import with the rest of the linked record information, mark this box.</td>
</tr>
<tr>
<td>Default prefix to add</td>
<td>If you want to add a prefix if there is none defined for the link match point tag you are working with when it is imported, enter the prefix in this field.</td>
</tr>
</tbody>
</table>

5  Save your changes.
6  Repeat steps 4 and 5 for each additional link match point that you want to use for link bibs.
7  Continue with “Setting Up Prefix Changes.”

Setting Up Prefix Changes

You can set up an import source to replace any prefix in the USMARC 001 tag either with another prefix or with a blank. (This will happen even if you have marked the Move 001 to 035 on import box in the matham view.) You can also choose to replace or remove prefixes in Link Match Point tags. (For more information, see “Setting Up Link Match Points” on page S-83.)

You can set up a default prefix to add, and set up multiple prefix changes. Horizon adds the default prefix if no prefix changes are specified, or if no additional prefixes are specified to be added.

**To set up prefix changes**

1  Open the **import_source** view in the Table Editor, or start the **Import Sources** process. The default location of this process is the **Cataloging\Cataloging Control Menu** folder on the navigation bar.
2 Choose the import source you want to change, or create a new import source.

3 Click Page Down or resize the window to display the Default prefix to add field:

Work in these fields to set up prefix changes.

4 Enter the default prefix you want Horizon to add to any imported records. (For example, enter “OCoLC” for OCLC records.) Horizon adds this prefix to the 001 tag or linking tags unless you set up prefixes to remove and add in the Prefix to Remove group.

5 Click Page Down or resize the window to display the Prefix to Remove group.

6 Complete or update these fields in the group:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix to Remove</td>
<td>If you want a prefix to be removed, enter it here. (For example, enter “ocm” for OCLC records.)</td>
</tr>
<tr>
<td>Prefix to Add</td>
<td>Enter the prefix to add in place of the one removed. This field can be left blank, which replaces the prefix with a blank unless you enter a default prefix in the Default prefix to add field.</td>
</tr>
</tbody>
</table>

7 Click New and repeat step 6 for any other prefixes that you want Horizon to change.

8 Save your changes.
Setting Up Item Creation Parameters

You can specify whether Horizon automatically creates item records from incoming bib records during import. If you choose this option, you must tell Horizon where to find the item information in the incoming records, and which item table columns should store the information after Horizon extracts it. (For example, you can specify the item tag as 949. From tag 949, Horizon extracts the call number, the collection, and the location, and puts the information in those item table columns.) If you want to add additional item information that you do not specify when you import bib records, you must add that information to each record manually.

You can also specify the match points Horizon checks when creating item records at import, and decide whether Horizon should preserve or overlay data in existing item records.

When setting up item creation parameters, you must specify these things:

- **Import Source.** The source used to import bib records.
- **Tag.** The tag in the incoming records that stores item information.
- **Item Columns.** A list of columns from the item table where incoming item information is stored to create the item.
- **Item Subfields.** The subfields in the item tag that contain the item information.
- **Item Match Points.** The information that Horizon uses to identify a record to overlay.

Once you set up the columns for the tags and subfields you want to use to create items, you can add item creation to your import sources.

This section explains these topics:

- Setting Up an Item Creation Column
- Defining Item Creation for an Import Source

Setting Up an Item Creation Column

When you set up a column for item creation, you specify where Horizon should look to find information such as call number, collection, item status, itype and location. This information becomes part of the new item record Horizon creates. You may also need to set up a priority for each subfield from which Horizon extracts information. Horizon checks the subfield with the lowest priority number first.

For example, suppose you had these tags and subfields containing call numbers:

- 050 a and b
- 090 a and b
- 092 a and b
- 099 a
You want Horizon to check tag 050 a first, so you enter the tag and subfield in the Item Map group entry and assign it priority 1:

![Edit Import Columns](image)

Sometimes two or more fields of a tag contain part of the item information you want to extract. The Concatenation Order field tells Horizon which subfield to extract information from first so that the information will be entered in the correct order in the item table. (For example, if you want Horizon to extract call numbers and the classification number in subfield a with the cutter number in subfield b, enter a “0” in the Item Map setup for subfield a and a “1” in the Item Map setup for subfield b of the tag you are using. This assures that the call number will be entered in the correct order in the item table.)

Here are some examples that show how you might set up item import parameters to extract this information:

<table>
<thead>
<tr>
<th>Item Information</th>
<th>View Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Collection</strong> (one collection stored in a single subfield)</td>
<td><img src="image" alt="Edit Import Columns" /></td>
</tr>
<tr>
<td><strong>Location</strong> (two possible locations, each stored in a separate subfield)</td>
<td><img src="image" alt="Edit Import Columns" /></td>
</tr>
</tbody>
</table>

For the second location, priority is different, but concatenation order is the same. Horizon will check n before it checks l. Only information from one subfield will be extracted.
Setting Up Import Source Parameters

**Item Information**

<table>
<thead>
<tr>
<th>Call Number</th>
<th>View Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>(one call number with two parts stored in two subfields)</td>
<td>![Image of Item Information View Setup]</td>
</tr>
</tbody>
</table>

For the second call number, priority is the same, but concatenation is different. Horizon will extract information from \( x \) before it extracts from \( y \). Information in both fields will be extracted.

**To set up item creation columns**

View: import_item_column

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Source</td>
<td>Enter or choose the code for the import source for which you are setting up item creation parameters.</td>
</tr>
<tr>
<td>Item Column</td>
<td>Enter the column in the item table where the item information is stored. (For a list of columns for each table, see the <em>Table Structures Guide.</em>)</td>
</tr>
<tr>
<td>Preserve Existing Data</td>
<td>If you want to keep existing values (such as a call number) for an existing item record that Horizon wants to overlay, mark this box.</td>
</tr>
<tr>
<td>Default Value</td>
<td>If you want to, enter a default value that Horizon stores in the column. This value should correspond to a defined code for the column. (For example, if the column is collection, enter the default value of the collection codes that is set up in the collection table.)</td>
</tr>
</tbody>
</table>
### Setting Up Item Creation Parameters

<table>
<thead>
<tr>
<th>In this field in the Item Map group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag</td>
<td>Enter the tag number that contains the item information.</td>
</tr>
<tr>
<td>Subfield</td>
<td>Enter the subfield that contains the specific information to be stored in the column.</td>
</tr>
<tr>
<td>Priority</td>
<td>If the bib tag contains more than one subfield with information you want to extract, enter a priority level for each subfield that indicates the order in which you want Horizon to check each subfield. Horizon checks the subfield with the lowest priority number first.</td>
</tr>
<tr>
<td></td>
<td>IMPORTANT If only one subfield contains the item information you are working with, enter “0” (zero).</td>
</tr>
<tr>
<td>Concatenation Order</td>
<td>If two or more subfields contain part of the item information, enter a concatenation order for each subfield that has part of the information. Horizon extracts information from a subfield with the lowest concatenation order number first. (For example, Horizon would extract information from a subfield with the concatenation number 5 before a subfield with the concatenation number 8.)</td>
</tr>
<tr>
<td></td>
<td>IMPORTANT If only one subfield contains the item information you are working with, enter “0” (zero).</td>
</tr>
<tr>
<td>Concatenation Suffix</td>
<td>1 If you want to separate the concatenated values Horizon extracts from multiple fields with a suffix, specify one here. (For example, enter a dash [ - ] to have Horizon place a dash between a classification number found in subfield a and a cutter number found in subfield b.)</td>
</tr>
<tr>
<td></td>
<td>2 If more than one subfield contains information you want to store in the column you are working on, click New and complete the fields in this table for the subfield.</td>
</tr>
<tr>
<td></td>
<td>3 If you have another item table column for which you want to extract item information from imported bib records, complete the fields in all of the tables in this task for the new item table column. You must set up parameters for each column you want filled for an item. (For example, you can set up parameters for the call number, the item status, the collection, and the item type.)</td>
</tr>
</tbody>
</table>
Defining Item Creation for an Import Source

After you have set up a column for item creation, you can add information to an import source so that Horizon creates item records when you import MARC records to your database.

To define item creation for an import source

1. Open the import_source view in the Table Editor, or start the Import Sources process. The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
2. Choose the import source you want to change, or create a new import source.
3. Click Page Down or resize the window to display the Item Column group:

   ![Image of Item Column group]

   In this field | Do this
   --- | ---
   Item Column | Enter a column in the item table where the item information is stored.
   | Use a column you created in “Setting Up an Item Creation Column” on page S-86.
   Preserve Existing Data | If you want to keep existing values (such as a call number) for an existing item record that Horizon wants to overlay, mark this box.
   Default Value | If you want to, enter a default value that Horizon stores in the column.
   | This value should correspond to a defined code for the column. (For example, if the column is collection, enter the default value of the collection codes that is set up in the collection table.)

4. Complete or update these fields as needed:

5. Click New and repeat step 4 for every additional column from which you want to extract information for new item records.
6. Click Page Down or resize the window to display the Item Match Points group.
7 Complete or update these fields as needed:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Column</td>
<td>Enter “item#” or “ibarcode”. Either of these columns from the item table uniquely identifies an item.</td>
</tr>
<tr>
<td>Ord</td>
<td>Enter the order number in which you want Horizon to check the match point you are working with.</td>
</tr>
<tr>
<td>Import Record Tag</td>
<td>Enter the bib tag on the incoming records that contains the item# or ibarcode value.</td>
</tr>
<tr>
<td>Import Record Subfield</td>
<td>Enter the bib subfield on the incoming records that contains the item# or ibarcode value.</td>
</tr>
</tbody>
</table>

8 Repeat step 7 for each additional match point that you want to use for item records.

9 Save your changes.

---

Setting Up Bib Tag Preservation

Catalogers can replace or overlay existing MARC records with incoming MARC records if the incoming record matches the existing record on specified match points. To preserve local information in the record being replaced, you can designate that Horizon preserve certain tags and store them in the incoming record. You can preserve one bib tag and one authority tag. (For more information on preserving authority tags, see “Setting Up Authority Tag and Field Preservation” on page S-97.)
To set up bib tag preservation

View:  bib_import_control

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag</td>
<td>Enter the number of the tag that you want to preserve.</td>
</tr>
<tr>
<td>Subfield</td>
<td>If you want to, enter the letter or number of a subfield in the tag whose information you want to preserve. Also enter a value in the Value field.</td>
</tr>
<tr>
<td>Value</td>
<td>If you entered a subfield, enter a value for the subfield. Leave this field blank or use an asterisk ( * ) as a wildcard to have Horizon find any record that includes the subfield. Use an exclamation point with an asterisk ( !* ) to find any record that does not include the subfield.</td>
</tr>
<tr>
<td>Keep Tag on Import Overlay</td>
<td>If you want to keep the tag that you are setting up as it displays in an existing record instead of using the tag from a matching incoming record, mark this field.</td>
</tr>
<tr>
<td>Log Bib if Overlay Involves this Tag</td>
<td>If you want to send a message to the Error Log that an existing record containing the tag you are setting up was overlaid by an incoming record, mark this field.</td>
</tr>
</tbody>
</table>
Using the Authority Loader

The Authority Loader works as part of the regular record import process. It lets you specify the rules Horizon uses to normalize text strings so that Horizon can make better matches during record import. It lets you choose whether to completely replace (overlay) an existing record, or to merge newly imported and existing records so that you can keep information in the existing records. It also lets you set rules that specify how Horizon handles imported authority records.

When you import, save, or search for authority records, Horizon normalizes the text string in the headings based on normalization rules. Normalization makes text more uniform so that records can match more closely. This can help Horizon create fewer duplicate authority records. When you use normalization rules, Horizon deletes special characters or punctuation, or converts them to standard symbols so that the text string comparison of match points is more accurate. You can set your own normalization rules or use standard rules. You can also set import rules that determine whether each incoming authority record is added to the database, overlays an existing record, merges with an existing record, or is deleted.

During authority record import, Horizon looks at the leader (byte 05) to find the status of each record as you import it. Some vendors’ authority imports work by deleting existing records before replacing them. If an import tries to delete an existing record, Horizon does not delete the record. Instead, Horizon temporarily retains the record in case the information in the record is needed by an item record imported later in the same batch. Horizon removes from the temporary retention list any records that are later replaced with an imported record.

If Horizon finds no match for the new record in the database, Horizon adds the new record. If Horizon does find a match for the new record in the database, Horizon overlays or merges the records, depending on the import rules you set up. You can choose to log any overlay or merge that involves a tag or subfield that you identify.

In an overlay, the incoming record completely replaces the existing record. Unique fields are not preserved. The new record keeps the system-generated record number of the original record, and all links connect to the new record.

In a merge, you can choose to keep the information in some tags or subfields of the existing record while overlaying others. You identify the tags and subfields you want to keep in the Authority Import Control view before you import the new records. (For example, you can choose to keep all call number [050] fields, or any 4xx, 5xx, or 6xx fields if the field contains a subfield 5.) Additionally, a merge handles use codes depending on the valid/invalid settings you make before importing. (A use code indicates whether the record is valid for use as a certain authority type.)

When you use the Authority Loader, you first choose the normalization rules you want to use. You set up any authority tag and fields that you want to preserve. Then you set up the import source parameters for each source from which you plan to load authorities. (For more information on import sources, see “Setting Up Import Source Parameters” on page S-68.)
Setting Up Import Source Parameters

This section explains these topics:

- Using Normalization Rules
- Setting Up Authority Tag and Field Preservation
- Merging Authority Use Codes

Using Normalization Rules

You can set normalization rules for the authority records that you import into Horizon. This helps Horizon create fewer duplicate authority records and improves searching. You can choose to use Horizon’s normalization rules, or you can use the Name Authority Cooperative program (NACO) normalization rules. (NACO is a component of the Program for Cooperative Cataloging [PCC] sponsored in part by the Library of Congress. For more information, see this web site: “http://www.loc.gov/catdir/pcc/2001pcc.html”. You can also edit the NACO table to implement your own rules.

This section explains these topics:

- Using Horizon’s Default Normalization Procedure
- Using the NACO Normalization Table

Using Horizon’s Default Normalization Procedure

Horizon’s default normalization procedure does these things:

- Removes left and right parentheses.
- Depending on your settings in the matham table, either removes trailing punctuation characters from the end of the string or removes trailing punctuation characters from the end of each subfield within the string. (For more information, see “Subfield Setup Tasks” in the “General Setup” chapter of the System Administration Guide.)
- Deletes leading and trailing spaces.
- Replaces multiple spaces with a single space.
- Performs a case-insensitive comparison.

To use Horizon’s default normalization procedure

1. Open the matham table 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.
2. Verify that your settings in the Auth Matching Ignores Punctuation and Preserve Auth Punct. in Marc Recs fields match your library policy.
3. Verify that the NACO Normalize Auth Matching field is unmarked.
4. Save any changes.
Using the NACO Normalization Table

If you choose to implement NACO normalization rules, Horizon does these things:

- Deletes or replaces special characters (such as diacritics and punctuation) from the entire string.
- Deletes leading and trailing spaces.
- Replaces multiple spaces with a single space.
- Performs a case-insensitive comparison.

(For more information, see this web site: “http://www.loc.gov/catdir/pcc/naco/normrule.html”.)

You can customize the NACO table to change or add normalization rules for your library.

Constraints

- When you change the option to use the NACO normalization tables or if you make any changes to the NACO tables in Horizon, you must reset authority match values by running the SynAuCon program before your database recognizes your changes.

You must run SynAuCon every time you make a change to the NACO table so that Horizon can update your system indexes to use the change you make.

If your library has many records, you may want to divide your authority table into smaller sections and run SynAuCon on multiple workstations, instead of running it against the entire table from a single workstation.

- Any changes that you make to normalization rules affect system-wide indexing, matching, and importing of only authority records. Normalization rules do not affect indexes that run on other MARC records.

NOTE

Horizon keeps the first comma in subfield a unless it is a terminal comma. Horizon replaces any other commas with a space.

IMPORTANT

You must run SynAuCon every time you make a change to the NACO table so that Horizon can update your system indexes to use the change you make.
To use normalization rules

1 If you want to make any changes in the NACO normalization rules, do these steps:

1 Open the NACO Normalization Administration process.
The default location of this process is the Cataloging Control Menu\Cataloging folder on the navigation bar.

<table>
<thead>
<tr>
<th>Input Code</th>
<th>Input Char</th>
<th>Output Code(s)</th>
<th>Output Character(s)</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>0032</td>
<td>2</td>
<td>Special Character: Subscript 2</td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td>0033</td>
<td>3</td>
<td>Special Character: Subscript 3</td>
<td></td>
</tr>
<tr>
<td>2004</td>
<td>0034</td>
<td>4</td>
<td>Special Character: Subscript 4</td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td>0035</td>
<td>5</td>
<td>Special Character: Subscript 5</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>0036</td>
<td>6</td>
<td>Special Character: Subscript 6</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>0037</td>
<td>7</td>
<td>Special Character: Subscript 7</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>0038</td>
<td>8</td>
<td>Special Character: Subscript 8</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>0039</td>
<td>9</td>
<td>Special Character: Subscript 9</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>0020</td>
<td>Special Character: Subscript +</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>0020</td>
<td>Special Character: Subscript -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>201D</td>
<td>0020</td>
<td>Special Character: Subscript Left Paren</td>
<td></td>
<td></td>
</tr>
<tr>
<td>201E</td>
<td>0020</td>
<td>Special Character: Subscript Right Paren</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2113</td>
<td>004C</td>
<td>Special Character: Lowercase L Script</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2117</td>
<td>0020</td>
<td>Special Character: Phonu/Sound Record</td>
<td></td>
<td></td>
</tr>
<tr>
<td>266D</td>
<td>266D</td>
<td>1</td>
<td>Special Character: Musical Flat</td>
<td></td>
</tr>
<tr>
<td>266F</td>
<td>266F</td>
<td>4</td>
<td>Special Character: Musical Sharp</td>
<td></td>
</tr>
<tr>
<td>FE10</td>
<td>0000</td>
<td>nothing</td>
<td>Discordic Ligature - first half</td>
<td></td>
</tr>
<tr>
<td>FE21</td>
<td>0000</td>
<td>nothing</td>
<td>Discordic Ligature - second half</td>
<td></td>
</tr>
<tr>
<td>FE22</td>
<td>0000</td>
<td>nothing</td>
<td>Discordic Double Tie - first half</td>
<td></td>
</tr>
<tr>
<td>FE23</td>
<td>0000</td>
<td>nothing</td>
<td>Discordic Double Tie - second half</td>
<td></td>
</tr>
</tbody>
</table>

Scroll to the asterisk (*) to add a new rule. An empty field in the Output Character(s) column when the output code IS “0020” means that Horizon will replace the character with a space.

2 Do one of these options:
   • If you want to add a new rule, scroll to the asterisk at the bottom and enter information in the empty code or comment fields.
   • If you want to edit an existing rule, click on the code or comment field that you want to edit.

   Horizon automatically enters the character that matches a code when you move the pointer out of the code field.

2 Open the matham table 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.

3 Mark the NACO Normalize Auth Matching box.
4 Open a command prompt.
5 Change to your Horizon upgrade directory.
6. Do one of these options:

- If you run SynAuCon from a single workstation, enter this at the command prompt:
  ```
synaucon /s server /p password /u user /d database
  ```
  For example, enter this command:
  ```
synaucon /slibserv /p1234546 /usa /dhorizon
  ```

- If you run SynAuCon from multiple workstations, enter this at the command prompt on each workstation:
  ```
synaucon /s server /p password /u user /d database /l logfilename
  ```
  The /l switch lets you change the name of your log file so that you can review each section of authority records that you change.
  For example, if you have authority records that are numbered 1 through 500,000, you can have one workstation process records 1 through 250,000 and a second workstation process records 250,001 through 500,000. To do this, enter commands like these on two different workstations:
  ```
synaucon /slibserv /p1234546 /usa /dhorizon /s1 /e250000 /lSynAuCon1.log
  synaucon /slibserv /p1234546 /usa /dhorizon /s250001 /e500000 /lSynAuCon2.log
  ```

### Setting Up Authority Tag and Field Preservation

You can specify authority tags in existing records that you want to keep when Horizon overlays records with new information. (For more information on general tag and field preservation, see “Setting Up Bib Tag Preservation” on page S-91.)

You can also choose from these additional options:

- You can choose to keep a tag based on whether a subfield you indicate has a value you identify. Indicating a subfield and a value means that the subfield you specify must equal the value you specify before Horizon will keep the tag.

- You can use wildcards for values.
  For example, if you set up a 450 tag with a subfield 5, you can use an asterisk (*) for the value. This keeps the 450 tag if subfield 5 exists. A value of an exclamation point with an asterisk (!*) indicates that you want to keep the 450 tag if the subfield does not exist.
  If you set up a non-repeatable tag and the existing record and the incoming record have different data in that tag, Horizon sends the record to the Error Log. (For more
Setting Up Import Source Parameters

Information, see “Using the Error Log” in the “Importing and Exporting Records” chapter of the Cataloging Guide.

NOTE

Even if you specify that Horizon should keep tags 644, 645, or 646 with a subfield 5 during an import, Horizon does not retain the tag if subfield 5 contains the same institution code on both the incoming and the existing record. This lets the incoming record replace the series practice fields in an existing record if both records were created by the same institution or organization, depending on your other overlay settings. (For more information, see “Overlay Options” in the “Importing and Exporting Records” chapter of the Cataloging Guide.)

- You can send an overlaid record to the Error Log if the overlay involves a tag that you set up.

  Sending the record to the Error Log does not stop the overlay. (For example, if you set up your import so that the merge involves a 150, 151, or 155 field, the Error Log displays the number of the modified authority record and the date of modification.)

To set up authority tag and field preservation

View: auth_import_control

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag</td>
<td>Enter the number of the tag that you want to preserve.</td>
</tr>
<tr>
<td>Subfield</td>
<td>If you want to, enter the letter or number of a subfield in the tag whose information you want to preserve. Also enter a value in the Value field.</td>
</tr>
</tbody>
</table>
Using the Authority Loader

Merging Authority Use Codes

You can specify that Horizon will merge the heading use codes of the authorities that you merge. This makes it easier to eliminate duplicate authorities in your Horizon database. You specify whether Horizon merges use codes in your merge profile.

To merge authority use codes

1. Start the Merge Profile Setup process.
   - The default location of this process is the Cataloging\Cataloging Control Menu folder on the navigation bar.
   - Horizon opens the Merge Profile Setup window:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>If you entered a subfield, enter a value for the subfield. Leave this field blank or use an asterisk (<em>) as a wildcard to have Horizon find any record that includes the subfield. Use an exclamation point with an asterisk (!</em>) to find any record that does not include the subfield.</td>
</tr>
<tr>
<td>Keep Tag on Import Overlay</td>
<td>If you want to keep the tag you are setting up as it displays in an existing record instead of using the tag from a matching incoming record, mark this field.</td>
</tr>
<tr>
<td>Log Auth if Overlay Involves this Tag</td>
<td>If you want to send a message to the Error Log that an existing record containing the tag you are setting up was overlaid by an incoming record, mark this field.</td>
</tr>
</tbody>
</table>

Mark this box to merge the use codes of authorities you merge.
2. From the **Profiles for Cat Type** drop-down list, choose the **Auth** entry code.

3. Choose the authority tags with use codes that you want to merge.

4. If you want to merge the use codes of authorities that you merge, mark the **Merge Use Codes?** box.

5. Save your changes.

---

**Setting Up Item Activity Tracking for Imported Records**

Item activity tracking in Horizon tracks the activity of an item record from the time when you import the MARC records for the item into Horizon until the item is made available in Circulation. Your library may want to track the MARC import source of items for budgeting reasons. (For example, you may need to report the number of items that your library imports from a specific vendor to determine the budget for items from that same vendor in the upcoming year.)

Horizon tracks activity beginning with the first item status that you assign to newly created item records. (For example, your library may choose to give newly acquired or newly created items a “newly acquired” or “in cataloging” status.) Horizon starts tracking the item by recording activity in the item_activity table in the database. Once you or your staff check in the item for the first time, Horizon records the checkin date in the item_activity table in the database to complete the tracking of the newly acquired item.

For every item with a trackable status, Horizon records activity such as creation date, circulation date, collection, MARC import source, report printing date, and so forth. You can view activity for items in the List Item Activity window and print an Item Activity report for these items. This report can help you determine how long it takes your library to process a specific item.

This section explains these topics:

- Defining a List of Sources for Imported MARC Records
- Assigning a Source Catalog Code to an Import Source Parameter
- Specifying Item Activity for Items with a Specific Status
Defining a List of Sources for Imported MARC Records

If you want to set up item activity tracking, you need to define a list of sources for your imported MARC records. This list will help you track the sources from whom you receive specific items. This information is important as you review item activity and run reports of item activity. It can help you make budget decisions as you acquire new library materials.

To define a list of sources for imported MARC files

1. Open the source_catalog view in the Table Editor.
   Horizon displays the List Source Catalog window.
2. Click New.
   Horizon displays the Edit Source Catalog window:

3. Complete these fields:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source Catalog</td>
<td>Enter a code for one of your MARC sources.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description that can help you identify the MARC source catalog.</td>
</tr>
</tbody>
</table>

4. Save your changes.
5. Create additional codes, as necessary.
   Once you define the sources of your MARC records, you can now assign a source catalog code to your import source parameters.
Assigning a Source Catalog Code to an Import Source Parameter

Once you have created your source catalog codes, you can assign a specific source catalog code to your import source profile so that you can track the source (vendor) of your imported records. The import source profile controls how you import MARC records. Horizon records the source catalog for each item that you specify as trackable in the item_activity table in the database. This source catalog of the item with a trackable status displays in the Item Activity Report.

(For more information about the import source profile, see the “Setting Up General Import Source Parameters for Bib and Authority Records” section in the “Setting Up Import Source Parameters” section of the Cataloging Setup Guide.)

NOTE

If you specify a source catalog code on the import source, Horizon saves this code when you save deleted information about item records that Horizon creates during bib import. (For more information, see “Defining a Source Catalog Code” on page S-59.)

To assign a source catalog code to an import source parameter

1. Open the import_source view in the Table Editor.
   Horizon displays the List Import Source window.

2. Choose the import source to which you want to add a source catalog, or create a new import source.
   Horizon displays the Edit Import Source window:

   ![Edit Import Source Window]

   Assign the import source a source catalog in this field.

3. In the Source Catalog field, enter the code for the source catalog that you want to assign to the import source.

4. Save your changes.
Specifying Item Activity for Items with a Specific Status

Horizon tracks items once they receive their first status until you check them in. You should specify that Horizon tracks the first status that you assign to newly created items. Once you set Horizon to track a specific status, when you create a new item record and assign it the trackable status, Horizon records activity for this item in the item_activity table in the database. This activity displays in the List Item Activity window. (For more information, see “Displaying Information about Trackable Items” in the “Tracking Item Activity” section of the “Item and Copy Records” chapter of the Cataloging User’s Guide.)

To specify item activity for items with a specific status

1. Open the item_status view in the Table Editor.
   Horizon displays the List Item Status window.
2. Choose the item status for which you want to track activity, or create a new status.
   Horizon displays the Edit Item Status window:

3. Mark the Track Cataloging box.
4. Save your changes.
Setting Up Export Parameters

You can export MARC bib and authority records to a floppy or hard disk. Exporting MARC records saves a copy of the records to a designated file. The original records remain unchanged in your database. You can include item information when you export bib records. This item information is extracted from the bib record’s item record and stored in a specified tag. When you export records, you determine these things:

- The tag and subfield that item information is stored in.
- The item column the information is extracted from.

You can specify as many item columns you want for each item tag.

To set up export parameters

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target</td>
<td>Enter the name of the export target. The target might be a cataloging utility or another location of your library to which you want to send item records.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the target.</td>
</tr>
<tr>
<td>Item Tag</td>
<td>Specify the tag number to which the item information will be exported.</td>
</tr>
<tr>
<td>In this field in the Item Columns group</td>
<td>Do this</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Item Column</td>
<td>Enter a valid column name from the item table that stores the information you want to export. (For a list of Columns for the item table, see the Table Structures Guide.)</td>
</tr>
</tbody>
</table>
| Subfield                               | 1 Enter the subfield in the item tag that will store the item information. One column can have multiple target subfields. (For example, to extract collection information, you can enter “collection” as the column, “k” as the first subfield to store information, and “l” as the second subfield to store information.)  
2 If more than one subfield contains information you want to store in the tag you are working on, click New, then complete the fields in this table for the new subfield.  
3 If you have other Item Columns from which you want to extract information, complete the fields in all of the tables in this task for the new Item Column. |

**Viewing the Invalid Audit Log**

Bib records should not be attached to invalid authority records. To verify that bib records are attached to valid authority records, Horizon checks these records:

- Existing bib records
- “New” records

If a change needs to be made to maintain the integrity of the database, Horizon makes the change and records it in the invalid audit log. You can open this log to verify that the changes Horizon makes are correct for your library.

Horizon logs errors in the invalid audit log during these circumstances:

- When Horizon makes changes to existing records or to incoming bib or authority records, such as attaching a bib record from an invalid authority to a valid authority, or changing a See reference to a See Also reference.
- When your library staff creates a uniform title and certain conditions do not exist. (For more information, see “Creating a Combined Authority Record” in the “Working with Uniform Titles” section of the “Authority Records” chapter of the Cataloging Guide.)
These are the types of entries that could be logged in the invalid audit log table:

<table>
<thead>
<tr>
<th>Entry_type code</th>
<th>Short Description</th>
<th>Long Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Simple</td>
<td>Simple Bib change. Invalid Auth found with only one valid form.</td>
</tr>
<tr>
<td>1</td>
<td>Complex</td>
<td>Complex Bib change. Invalid Auth found with multiple valid forms.</td>
</tr>
<tr>
<td>2</td>
<td>AuthChange</td>
<td>Auth Change. Sysgen valid Auth now invalid. Bibs linked are moved to valid form.</td>
</tr>
<tr>
<td>3</td>
<td>BibChange</td>
<td>Bib change as a result of Auth change from valid to invalid.</td>
</tr>
<tr>
<td>4</td>
<td>SeetoSeeAlso</td>
<td>Auth See reference changed to See Also reference.</td>
</tr>
<tr>
<td>5</td>
<td>SeeAlsotoSee</td>
<td>Auth See Also reference changed to See reference.</td>
</tr>
<tr>
<td>6</td>
<td>CompDupSubf</td>
<td>Compound and co-tags have duplicate subfields.</td>
</tr>
<tr>
<td>7</td>
<td>CompMissReqSubf</td>
<td>Compound or co-tag is missing required subfields.</td>
</tr>
<tr>
<td>8</td>
<td>ValidInvalidInversion</td>
<td>Authority Valid/Invalid relationship inverted by Text Match.</td>
</tr>
<tr>
<td>9</td>
<td>ValidInvalidDup</td>
<td>Duplicate valid and invalid heading created by Text Match.</td>
</tr>
<tr>
<td>10</td>
<td>Link On Match</td>
<td>Bib heading was left unlinked due to a “Link On Match” auth link type setting.</td>
</tr>
<tr>
<td>11</td>
<td>Link Never</td>
<td>Bib heading was left unlinked due to a “Link Never” auth link type setting.</td>
</tr>
</tbody>
</table>

**NOTE**

When you open the bib_auth_invalid_audit view, Horizon loads all of the rows. To limit the rows that display, you can select a column, such as the date, to limit by. To limit further, you can press SHIFT+F2 and enter a “where” clause.

For example, to select all type “2” entries that changed while John was logged on that have not yet been resolved, press SHIFT+F2 and enter this command:

```
horizon_user_id = “john” and entry_type = 2 and resolved = 0
```
To view the invalid audit log

1. Open the bib_auth_invalid_audit view in the Table Editor.
2. Choose the log entry you want to view.
3. Click Edit.
   Horizon displays the Edit Invalid Bib Auth Audit Log.
4. Do one of these options:
   - If you are working with authority headings, verify that the text in the New Text field is the correct valid authority heading. If it is not, you can manually change the text in the MARC Editor. (This field may be blank if the entry type does not require a new heading.)
   - If you are working with uniform title tags, verify what subfields are missing or duplicated (displayed in the New Text field) and open the bib record in the MARC Editor to resolve the problem.

Specifying Bib Information in Fast-Added Records

In Circulation, Acquisitions, and Reserve Bookroom, library staff members can choose to create short bib records. In Circulation, they can fast-add bib records so that a borrower can check out an item that may not be cataloged for some reason. In Acquisitions, they can create PO lines from which Horizon creates bib records when the purchase order is sent. In Reserve Bookroom, staff can create bib records for titles not housed in the main stacks.

You determine the type of information staff can enter in fast-added records. Information might include title, author, ISBN, and publisher.

Setting up fast-added records includes specifying these things:

- The bib table column that stores the information you want staff to enter.
- How the information is used (as an author, title, and so forth).
- The label that displays next to the field on the fast-added record.
- One of two MARC maps: one for indexing the record if you want borrowers to be able to search for it in PAC; and one for including the record in the database if you do not want borrowers to be able to search for it in PAC.

When fast-added records are created, if the new records are assigned a MARC map that indexes fast-added items, Horizon stores the information in an indexed tag. This lets borrowers find the item from the type of search the MARC map accesses.

To specify bib information in fast-added records

NOTE
You can copy and paste the text from these fields into MARC records. You can also print the list screen or a subset of the list screen.

NOTE
By default, Horizon assigns the user default ownership to fast-added bib records.
### View: marc_usage

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Module</strong></td>
<td>Mark the option to which the MARC usage definition applies. (For example, if you are defining fast-add records for Cataloging, mark CAT.)</td>
</tr>
<tr>
<td><strong>Column Name</strong></td>
<td>Enter the column on the bib table from which the information is retrieved. (For example, enter “issn” as the column from which the ISSN number is retrieved or placed.) For a list of all columns in the bib view, see the Table Structures Guide.</td>
</tr>
<tr>
<td><strong>Usage</strong></td>
<td>Mark the option that specifies how the data is used in the bib record.</td>
</tr>
<tr>
<td><strong>Label</strong></td>
<td>Enter the label that displays on the record for the field. (For example, if you are setting up MARC usage for title information on purchase orders in Acquisitions, enter “Title”.)</td>
</tr>
<tr>
<td><strong>MARC map (indexed)</strong></td>
<td>If you want borrowers to be able to search in PAC for the type of fast-added items you are designing, enter or choose a MARC map to link to the field for searching on in PAC.</td>
</tr>
<tr>
<td><strong>MARC map (not indexed)</strong></td>
<td>If you do not want borrowers to be able to search in PAC for the type of fast-added items you are designing, enter a MARC map that links to the field but does not allow searching on in PAC.</td>
</tr>
</tbody>
</table>
Setting Up Bib and Authority Record Statuses

The status of a bib or authority record tells library staff how much cataloging the associated item has had. (For example, an item can have a status of “In Process,” “user fast added,” or “Cataloging Complete.”) You can edit or add new record statuses to Horizon. You can also set a default status for bib and authority records. Horizon uses the default status when a status is not specified on a new record.

To set up bib and authority record statuses

View: bib_status or auth_status

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Status        | Enter the status code.  
This code can contain up to seven characters. |
| Description   | Enter the status description.  
This is the description that displays in the status code lookup list in the MARC Editor. |
| Default       | Mark this box if you want this status to be the default.  
You can select only one status as the default. |
Setting Up Call Numbers

You can set up Horizon to automatically complete the Call Number field for new item or copy records. If catalogers are creating a large number of item or copy records with the same call number, you can set a default call number for all of the new item and copy records.

This section explains these topics:

- Automatically Filling the Call Number Field in a New Item or Copy Record
- Defining a Default Value for a Call Number

Automatically Filling the Call Number Field in a New Item or Copy Record

When a library staff member creates a single new item or copy record in Cataloging, Horizon can automatically fill the call number field in the new record. This can cut down on the number of keystrokes needed to create a new record. Staff can edit an automatically-filled call number field in the same way that they edit any other field.

If your library chooses to use this feature, you must define relationships between bib and item records. You must also configure MARC maps to determine which bib record tags Horizon checks for the call number, and the order in which Horizon checks those tags.

NOTE

This feature affects only newly created bib records, not imported records. You can use the 949 tag to import call numbers. (For more information, see “Setting Up Item Creation Parameters” on page S-86.)

This section explains these topics:

- Configuring MARC Maps for Automatic Call Number Fill
- Defining Relationships between MARC Records for Automatic Call Number Fill
Configuring MARC Maps for Automatic Call Number Fill

If you set up automatic call number fill, Horizon uses MARC maps to determine which bib record tags Horizon checks for the call number, and the order in which Horizon checks those tags. (If no call number is found in any of the tags, staff must add the call number manually.)

You can change this configuration at any time for any reason. However, only item records created after you change the configuration will be affected. Horizon does not automatically add call numbers to pre-existing records.

IMPORTANT

Use the appropriate USMARC or UNIMARC standards when you configure your MARC maps.

To configure MARC maps for automatic call number fill

1. In the Table Editor, open the marc_map view, or start the MARC Map Table process. The default location of this process is the Administration\Index Control Menu folder on the navigation bar.

2. Choose the call MARC map.

3. Click Page Down or resize the window to display the fields in the Extraction group:

4. Complete or update the fields as necessary to identify each tag and the subfields within it that you want Horizon to check for call numbers.

   Enter each tag with its subfields in the order in which you want Horizon to check the tags. (You can enter multiple subfield letters in the same Part field for a single tag.) You must click New for each tag you enter.

   For example, if you want Horizon to first check for a local call number, second for a Library of Congress call number, and finally for a Dewey call number, enter this information in this order in the Extraction group:

   Tag 090, Part a
   Tag 050, Part ab
   Tag 082, Part ab
Setting Up Call Numbers

(For more information on these fields, see “Understanding Display MARC Maps” in the “General Setup” chapter of the System Administration Guide.)

5 Save your changes.

Defining Relationships between MARC Records for Automatic Call Number Fill

You must define MARC usage relationships between bib and item records before Horizon can use the bib record call number to automatically fill the attached item and copy records. When you define relationships between MARC records, you create a connection between the call number fields. This means that if staff members edit a call number in an existing bib or copy record, Horizon displays a message asking if they want to change the call numbers in any attached copy and item records, also.

However, the connection between records lets staff edit only from the top of the hierarchy down. This means that when they make changes in a bib record, Horizon asks if they want to make changes in the attached copy and item records. If they make changes in a copy record, Horizon asks if they want to make changes in the attached item records. However, Horizon cannot apply changes made in an item or copy record to a bib record, or in an item record to a copy record.

NOTE

If you want to, you can also set up conditional MARC maps for automatic call number fill. (For instructions, see “Understanding Conditional Parts of a MARC Map” in the “General Setup” chapter of the System Administration Guide.)

NOTE

If you have defined default values for call numbers in Horizon views and defined MARC usage relationships between bib and item records, the default view value overrides the usage relationship. (For more information on default call numbers, see “Defining a Default Value for a Call Number” on page S-114.)
To define relationships between MARC records for automatic call number fill

**View:** marc_usage

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module</td>
<td>Mark CAT.</td>
</tr>
<tr>
<td>Usage Order</td>
<td>Enter “call”.              This is the name of the table column. If you enter an incorrect column name, Horizon cannot automatically fill the call number fields.</td>
</tr>
<tr>
<td>Usage</td>
<td>Mark the Other option.</td>
</tr>
<tr>
<td>Label</td>
<td>Enter a name for the usage you are defining. (For example, enter “Call Number”. This is an optional field.</td>
</tr>
<tr>
<td>MARC Map (indexed)</td>
<td>Enter the name of the MARC map you configured for automatic call number fill.</td>
</tr>
</tbody>
</table>
Defining a Default Value for a Call Number

If you want to, you can add a default call number value to an item or copy view. You might want to do this if you want to create a large number of records that use the same call number. A default call number automatically displays in a new record when library staff creates an item or copy record. A default call number also overrides any automatic fill settings you may have made. (For more information about automatic call number fill, see “Automatically Filling the Call Number Field in a New Item or Copy Record” on page S-110.)

NOTE

If you add a default call number value to an item or copy view, you should remove it after your library finishes creating the records that use that call number.

To define a default value for a call number

1. Open the mq_view view in the Table Editor, or start the View Control process. The default location of this process is the Administration\System Setup folder on the navigation bar.
2. Do one of these options:
   - If you want to define a default value for an item record, choose the item mq_view.
   - If you want to define a default value for a copy record, choose the cat_copy mq_view.
3. Click Page Down or resize the window to display the Edit View group:

   ![Edit View Group Image]

4. From the drop-down menu, choose the column that contains the call number.
5. In the Default Value field, enter the call number that you want to use as a default for the records that you create.
6. Save your changes.
Setting Up Non-MARC Parameters

The process of creating and editing non-MARC records sounds similar to creating and editing MARC records: catalogers use a workform to create new records, add and delete fields, attach authorities, and edit text. However, the processes of setting up the parameters and using the workform, and the way the workform looks, are different.

Here is an example of a simple non-MARC record:

Catalogers choose from a list of non-MARC workforms you establish, and add information in fields. Horizon lets you create two types of workforms:

- **Static Workform.** Used to create records to which fields cannot be added or deleted. A static workform lets you control the fields and information catalogers can include in a record.

- **Dynamic Workform.** Used to create records to which fields can be added or deleted. A dynamic workform provides catalogers more flexibility with the fields and information they can add to or delete in a record.

Each workform contains a set of default fields. You must set up the default fields for both types of workforms, and the fields catalogers can add to dynamic workforms. Setting up the fields includes specifying these things:

- **Elements.** In a non-MARC workform, elements are the control records that link non-MARC data to MARC numbered fields so Horizon can index the non-MARC data properly. This is called “mapping.”

- **Field groups.** These are elements that are added as a unit. (For example, an imprint group could include the place of publication, the publisher’s name, and the publication date.) Field groups can contain only one field, or several.
This chart illustrates the workflow necessary to set up non-MARC cataloging (you must do all the steps in the order shown):

1. Use the non_marc_element view to create bib-based non-MARC elements.
   (Leave the Auth Workform field blank for now.)
   (For instructions, see “Setting Up a Non-MARC Element” on page S-117.)

2. Use the non_marc_element view to create authority-based non-MARC elements.
   (Always leave the Auth Workform field for authority-based non-MARC elements blank.)
   (For instructions, see “Setting Up a Non-MARC Element” on page S-117.)

3. Use the non_marc_field_group view to create bib-based non-MARC field groups.
   (Use the bib elements created in step 1.)
   (For instructions, see “Setting Up a Non-MARC Field Group” on page S-119.)

4. Use the non_marc_field_group view to create authority-based non-MARC field groups.
   (Use the authority elements created in step 2.)
   (For instructions, see “Setting Up a Non-MARC Field Group” on page S-119.)

5. Go to Cataloging and create non-MARC authority workforms.
   (Use the authority groups created in step 4.)
   (For instructions, see “Creating a Non-MARC Workform” in the “Workforms” chapter of the Cataloging Guide.)

6. Reopen the bib elements you created in step 1 and attach the non-MARC authority workforms you created in step 5 to the non-MARC bib elements.
   (For instructions, see “Setting Up a Non-MARC Element” on page S-117.)

7. Go to the MARC Editor and create non-MARC bib workforms.
When you set up non-MARC elements, groups, and workforms, you create the tools that catalogers use to build non-MARC records. Your catalogers may find it helpful if you identify each tool as non-MARC when you set it up. (For example, label the title field “NMTitle”.) This can help the catalogers use the right tools—MARC or non-MARC—when they build records.

This section explains these topics:

- Setting Up a Non-MARC Element
- Setting Up a Non-MARC Field Group
- Setting Up Commonly Used Non-MARC Field Groups
- Setting Up a Non-MARC Workform

## Setting Up a Non-MARC Element

Instead of tags, fields, and subfields, catalogers who are creating or editing non-MARC records work only with fields—title, author, publication, and so forth. Horizon links those non-MARC fields to MARC tags “behind the scenes.” (For example, a title field on a non-MARC record would be linked to a 260 bib tag. An author field would be linked to a 100 bib tag.) This linking is referred to as “mapping.”

You need to specify which non-MARC fields are the equivalent of MARC fields. You need to do this for all bib-based non-MARC elements you plan to use in your non-MARC records, and for each type of authority-based non-MARC element (author, series, and subject). Horizon uses this setup to store and retrieve the records, as well as for indexing and display purposes in PAC.

**NOTE**

You may not be able to configure some authority-controlled non-MARC elements, groups, and workforms with all the desired subfields. You may have to enter all the information in a single subfield.

**IMPORTANT**

You must do this task for all bib-based and authority-based non-MARC elements that you want to use in non-MARC records.
To set up a non-MARC element

View: non_marc_element

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Enter a code to identify the non-MARC element you are setting up. This code can be up to seven characters long. You may find it helpful to identify the element as non-MARC. (For example, enter “NMTitle”.)</td>
</tr>
<tr>
<td>Label</td>
<td>Enter the text you want displayed next to the field on the record in the MARC Editor.</td>
</tr>
<tr>
<td>Tag</td>
<td>Enter the MARC tag that stores the information displayed in the field. (For example, enter “245” as the tag for a title field. If the field is a publisher, enter “260”. If it is an author, enter “100”.)</td>
</tr>
<tr>
<td>Subfield</td>
<td>Enter the MARC subfield that stores the information displayed in the field.</td>
</tr>
<tr>
<td>Auth Type</td>
<td>Mark the option that identifies the field as either a bib field or an authority field.</td>
</tr>
<tr>
<td>Authority Block</td>
<td>Mark the option if the field you are creating is the only one for the type of authority it represents.</td>
</tr>
</tbody>
</table>

For example, you can create three authority blocks: author with a tag of 100; subject with a tag of 600; and series with a tag of 400. Any new authorities created in non-MARC records would have to use one of these three tags, and any MARC authority sent from PAC to attach to the non-MARC record would go into the corresponding “block” element.

If you want your catalogers to use MARC cataloging rules when cataloging titles in non-MARC format, you should always leave the “None” button in this field marked. You should also repeat this task to create a different mapping for each possible authority tag (700, 710, 600, 650, and so forth).
Setting Up a Non-MARC Field Group

When you add a new field to a record, you add the field as a group, even if it only contains one element. Here is an example of a non-MARC record that consists of three groups:

- Title group
- Author group
- Publication Information group

You can create field groups that represent several MARC tags, or that represent several subfields from one tag. (For example, you can create a title field group that consists of a title tag and a publication tag. Similarly, you can create an author field group that consists of the subfields for name and for birth and death dates.) The publication field group shown is an example of a field group consisting of several subfields for the 260 tag: subfields b and c. (For examples of how to create commonly used field groups, see “Setting Up Commonly Used Non-MARC Field Groups” on page S-122.)

When you set up field groups, you specify these things:

- The fields that make up the group.

### In this field | Do this
--- | ---
Sort Order | Enter the numerical order in which you want the field to appear in the non-MARC record. (For example, if you want the field to be in the second position, enter “2”.)
Auth Workform | 1 If the field is a bib authority field, enter the authority workform code to which that field links.
You must link bib authority fields to the corresponding auth authority field. (For example, you must link the bib tag 100 to the author authority tag 100.) You need to create the authority workform before you can link them to the bib element. (For instructions, see “Creating a Non-MARC Workform” in the “Workforms” chapter of the Cataloging Guide.)
2 If you have other MARC tags you want represented in your non-MARC workform, complete the fields in all of the tables in this task for the new MARC tag.
Setting Up Non-MARC Parameters

- Any default values that you want to appear in a field when the group is added to a record.
- Edit properties for the field.
- Display properties for the field.

Before You Begin

If you have not already done so, you must create bib-based non-MARC elements and auth-based non-MARC elements. (For instructions, see “Setting Up a Non-MARC Element” on page S-117.)

To set up a non-MARC field group

View: non_marc_field_group

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Group</td>
<td>Enter a code to identify the new field group. This code can be up to seven characters long. You may find it helpful to identify the record as non-MARC. (For example, enter “NMTitle”.)</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the field group that identifies the group of fields.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In this field in the Fields group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>Enter the numerical order in which you want the field to appear. (For example, if you want the field to be in the second position, enter “2”.)</td>
</tr>
<tr>
<td>Field Width</td>
<td>Enter the number of characters the field can contain. You can enter a number between 1 and 255.</td>
</tr>
</tbody>
</table>
Setting Up a Non-MARC Field Group

<table>
<thead>
<tr>
<th>In this field in the Fields group</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Element</td>
<td>Enter the MARC element that links the field to the MARC tag. This is the mapping between non-MARC fields and MARC tags you set up in the non_MARC_element view. (For more information, see “Setting Up a Non-MARC Element” on page S-117.)</td>
</tr>
<tr>
<td>Default Value</td>
<td>Enter any information you want Horizon to display in this field by default when cataloging staff adds the group to a record.</td>
</tr>
</tbody>
</table>
| Edit Properties                  | This field controls edit variables for the group. Do one of these options:  
  - **Required.** Mark this box to make the field required. Catalogers must complete required fields before they can save the record.  
  - **Empty on Copy.** Mark this box to have Horizon clear information from the field when catalogers copy the record.  
  - **Adjacent to Previous.** Mark this box to display the field to the right of the previous field (if there is more than one field in the group). Horizon displays fields beneath one another by default. |
| MARC Props.                      | 1 Mark the **Part of Previous** box if the field is part of the previous field by MARC standards. (For example, you would mark this box for publication date field, which is part of the publisher field.)  
  2 If you want catalogers to be able to add the group to a dynamic non-MARC workform, mark the **Show in “Add Field” List on Dynamic View** box.  
  3 If you want to add more elements to this field group, click **New**, then complete the fields in this table for the new element.  
  4 If you have other field groups you want to set up, complete the fields in all of the tables in this task for the new field group. |
Setting Up Commonly Used Non-MARC Field Groups

After you create bib-based and authority-based non-MARC elements, you use the elements to set up non-MARC field groups. This section gives examples of how to set up these commonly used non-MARC field groups:

- Author
- Title
- Publication information (place, date, and publisher)

The result of this task is a list of non-MARC field groups from which catalogers can choose when they want to add a field to a non-MARC record:

(For general instructions on setting up a non-MARC field group, see “Setting Up a Non-MARC Field Group” on page S-119.)

After you set up non-MARC field groups, you must also create non-MARC authority workforms and attach the authority workforms to the bib elements before you can create non-MARC workforms to use in the MARC Editor. (For more information on the workflow of this task, see the non-MARC cataloging workflow chart on page S-116.)

To set up commonly used non-MARC field groups

1. Determine the groups that you want catalogers to be able to add to records.
2. Determine the fields for each group.

   For example, you could include these fields and these groups:

<table>
<thead>
<tr>
<th>Group</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authors</td>
<td>Author’s Name</td>
</tr>
<tr>
<td>Title</td>
<td>Title</td>
</tr>
<tr>
<td>Publication</td>
<td>Publication place, publisher, and date</td>
</tr>
</tbody>
</table>
3. Determine which MARC bib tag or subfield each field corresponds to:

<table>
<thead>
<tr>
<th>Field</th>
<th>Tag</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>100</td>
</tr>
<tr>
<td>Title</td>
<td>245</td>
</tr>
<tr>
<td>Pub. Place</td>
<td>260a</td>
</tr>
<tr>
<td>Publisher</td>
<td>260b</td>
</tr>
<tr>
<td>Pub. Date</td>
<td>260c</td>
</tr>
</tbody>
</table>

4. Use this table to set up the non_marc_element view for each field (make sure you set up both bib-based and authority-based non-MARC elements):

<table>
<thead>
<tr>
<th>Non_MARC Field</th>
<th>View Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author field in an authority record</td>
<td>![Image of Author field setup for authority record]</td>
</tr>
<tr>
<td>Author field in a bib record</td>
<td>![Image of Author field setup for bib record]</td>
</tr>
<tr>
<td>Non_MARC Field</td>
<td>View Setup</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Title field in a bib record</td>
<td><img src="image1" alt="NM Title Configuration" /></td>
</tr>
<tr>
<td>Publication place in a bib record</td>
<td><img src="image2" alt="NM Publication place Configuration" /></td>
</tr>
<tr>
<td>Publisher in a bib record</td>
<td><img src="image3" alt="NM Publisher Configuration" /></td>
</tr>
<tr>
<td>Non_MARC Field</td>
<td>View Setup</td>
</tr>
<tr>
<td>----------------</td>
<td>------------</td>
</tr>
<tr>
<td>Publication date in a bib record</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
</tbody>
</table>

5 Use this table to set up the non_marc_field group view for each field (make sure you set up both bib-based and authority-based non-MARC elements):

<table>
<thead>
<tr>
<th>Non-MARC Field Group</th>
<th>View Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author group</td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td>Title group</td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
</tbody>
</table>
Setting Up Non-MARC Parameters

You can now use these non-MARC groups to create non-MARC workforms.

<table>
<thead>
<tr>
<th>Non-MARC Field Group</th>
<th>View Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication information group</td>
<td></td>
</tr>
</tbody>
</table>

Setting Up a Non-MARC Workform

Once you have defined the non-MARC bib-based and authority-based elements and field groups, you can assign them to dynamic and static workforms. You create workforms in Cataloging. (For information on creating workforms, see “Creating a Non-MARC Workform” in the “Workforms” chapter of the Cataloging Guide.)

You need to create non-MARC authority workforms first. You may find it helpful to identify each workform as non-MARC. (For example, you could describe the non-MARC author workform as “NMauth.”) Then you need to go back to the non_MARC_element view and link the non-MARC authority workforms to the appropriate bib element. (For instructions, see “Setting Up a Non-MARC Element” on page S-117.) After you link the elements to the authority workforms, you can create bib workforms. Then you can use the workforms to create non-MARC records.
Understanding Deferred Indexing

When your library staff adds or changes MARC records, Horizon processes dozens of indexes while saving the record. Each record takes a substantial amount of time to process simply because of the number of indexes the system must update. Deferred indexing is the process of postponing a portion of the indexing when you add or change MARC records, or re-index the Horizon database for any reason. This process helps your cataloging workstation maintain good response time during indexing procedures. (For example, if during regular indexing you have many indexes configured, it may take more than 30 seconds to import a typical bib record. With deferred indexing, this time can be cut to a few seconds.) However, deferred indexing may not work for every library.

You can use deferred indexing to improve indexing time if your library meets one or both of these criteria:

- While importing, your cataloging workstation is heavily affected by the time it takes to save records. If saving a MARC record frequently takes more than a few seconds, you should consider using deferred indexing.
- You have several dozen MARC indexes on your system. If you have fewer indexes, deferred indexing cannot improve your system’s indexing time.

This table illustrates how deferred indexing can help speed up your Cataloging processing:

<table>
<thead>
<tr>
<th>Type of Indexing</th>
<th>Total number of MARC indexes</th>
<th>Processed immediately</th>
<th>Processing deferred</th>
<th>Typical time to save or import one record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular indexing</td>
<td>80</td>
<td>80</td>
<td>0</td>
<td>38 seconds</td>
</tr>
<tr>
<td>Deferred indexing</td>
<td>80</td>
<td>12</td>
<td>68</td>
<td>2 seconds</td>
</tr>
</tbody>
</table>

You use deferred indexing by setting up queues. A queue is a list of records and indexes that are waiting for Horizon to process them. Usually, you need to set up only one queue. However, if you set up and use one queue for deferred indexing and your indexing is still slow, you can set up multiple deferred queues.

To use deferred indexing, you should set up a dedicated network workstation, or one that is rarely used for other tasks, to run the deferred indexing utility. You can set up Horizon to start deferred indexing whenever this workstation is booted or from a menu option.

**NOTE**

Deferred indexing will not resolve such issues as network bandwidth problems, insufficient RAM on the workstation, and so forth. Make sure your network, workstation, and Horizon system are working efficiently before you choose to set up deferred indexing.

This section explains these topics:

- Setting Up Deferred Indexing
- Using Deferred Indexing
- Setting Up Complex Deferred Indexing
Understanding Deferred Indexing

- Deferred Indexing Errors

**IMPORTANT**

This section assumes you are familiar with and have a strong understanding of basic Horizon indexing processes.

---

**Setting Up Deferred Indexing**

When you set up deferred indexing, you choose which indexes to process immediately and which to defer. Deferred indexing provides two main features that aid in the processing of your indexes:

- **A system of queues.** A queue is a list of records and indexes waiting for processing. You assign each index to a queue by assigning the index a number (for example, 0 or 1). By default, all indexes are assigned to queue 0. Horizon processes indexes assigned to queue 0 as soon as your library staff saves or imports a MARC record. Indexes assigned to queue 1 are deferred. This means that Horizon places each saved or updated index in a queue to be processed on a separate workstation.

**IMPORTANT**

Although the system allows up to 255 queues, SirsiDynix strongly recommends you start with a single deferred queue. (For information about setting up multiple queues, see “Setting Up Complex Deferred Indexing” on page S-142.)

- **Queue Indexer.** The queue indexer is the utility that processes the indexes you choose to defer. Horizon’s queue indexer is called “QIndex.” This is a command-line utility program that runs on a computer you dedicate to deferred indexing. QIndex works by reading a series of rows from the mq_index_queue table and then processing these entries on a record-by-record basis for a queue. The mq_index_queue table is a list of records that QIndex needs to index. After a record has been indexed, QIndex deletes the queue rows for that record (the deletion is part of the same database transaction as the indexing itself).

You defer processing of specific indexes by ranking indexes on level of necessity. In general, you can group your indexes into these two categories:

- **Non-deferred indexes.** These are the indexes you process immediately. These indexes are used by your cataloging or acquisitions staff to find and manipulate the record after it is saved. Non-deferred indexes are processed on your technical workstation (where your cataloging transactions occur). Because these indexes are used by cataloging and acquisitions staff to complete the processing of the materials, they must be updated immediately.

- **Deferred indexes.** These are the indexes where the processing is postponed. These indexes are either highly specialized or used for public searching purposes. Because these indexes are not immediately necessary, you can choose to defer them. Deferred indexes are processed on the QIndex workstation (this is the computer you have dedicated to deferred indexing). Because there is generally a delay between the time you import a record and when you make the item available to the public, a short delay in indexing should not be critical to the smooth operation of your library.
Here is an example of how deferred indexing works:

In this example, Horizon indexes the 12 fundamental, non-deferred indexes on your technical workstation when a record is saved. At the same time, the 68 deferred indexes are indexed on the QIndex workstation. Although QIndex will fall behind because it has more work to do, it can catch up during times when large amounts of MARC data is not being saved. Because QIndex operates on its own workstation, your staff is not kept waiting while QIndex processes the indexes.

This section explains these topics:

- Assigning Indexes for Deferred Indexing
- Starting QIndex
Assigning Indexes for Deferred Indexing

Deferring a portion of your indexing helps reduce the time your cataloging staff must wait for Horizon to index MARC records. You defer indexes by assigning them to a queue to await processing. Non-deferred indexes are assigned to queue 0 to be indexed immediately, and deferred indexes are assigned to queue 1 to await processing on the QIndex workstation.

This table gives examples of non-deferred and deferred indexes:

<table>
<thead>
<tr>
<th>Queue</th>
<th>Type of Index</th>
<th>Indexes included in this category</th>
<th>Example</th>
<th>Where processed</th>
</tr>
</thead>
</table>
| 0     | Non-deferred  | • Those necessary for cataloging or acquisitions staff  
• Any index used as a match point.  
• All non-MARC data indexes | • PO Line Title Keyword  
• ISSN  
• Borrower Keyword | Technical workstation |
| 1     | Deferred      | • Those used by the public for PAC searches or reference desk staff  
• Highly specialized indexes | • Author Keyword  
• Number of Musical Performances | QIndex workstation |

When you choose to defer indexes, you can choose the indexes either one at a time or in a batch. This section explains these topics:

- Assigning a Single Index to a Deferred Queue
- Assigning Multiple Indexes to a Deferred Queue

Assigning a Single Index to a Deferred Queue

You can assign indexes to a deferred queue one at a time.

To assign a single index to a deferred queue

1. Open the `mq_index` view in the Table Editor, or start the `Indexes` process.
   The default location of this process is the `Administration\Index Control Menu` folder on the navigation bar.
2. Choose the `mq_index` you want to defer.
   Horizon displays the Edit Horizon Index Definitions window.
3 Click Page Down or resize the window to display the Queue field:

Enter the queue to which you want this index assigned.

4 In the Queue field, enter the queue to which you want the index assigned.

5 Save your changes.

Assigning Multiple Indexes to a Deferred Queue
You can assign several indexes to the same queue by doing a batch change.

To assign multiple indexes to a deferred queue

1 Open the mq_index view in the Table Editor, or start the Indexes process.
   The default location of this process is the Administration\Index Control Menu folder on
   the navigation bar.

2 Choose the mq_indexes you want to defer.
   Horizon displays a Batch Change Message asking if you want to make a batch change to
   all selected indexes.

3 Click OK.
Horizon displays the Batch Change Horizon Index Definitions window:

```
[Image]
```

4. In the Queue field, enter the queue to which you want to assign the selected indexes.
5. Save your changes.

Starting QIndex

You should have at least one workstation to dedicate to the QIndex utility for deferred indexing. This workstation should rarely be used for other tasks. (For example, you can put QIndex on the same computer that runs your Day End Processes—unless you are importing MARC records at the same time you run Day End.) If you want to reduce network traffic to a minimum, the workstation you choose should be on the same subnet as the database server. This workstation should also be reasonably fast.

There are several possible methods you can use to start QIndex:

- **Set up QIndex to start automatically when the workstation is booted.** You start QIndex automatically by placing a QIndex shortcut in the Windows StartUp group. (For instructions, see your Windows User’s Guide.) This method requires no involvement on your part after the initial start up. QIndex starts up as soon as you log on to the workstation.

  **IMPORTANT**

  SirsiDynix recommends that you set up QIndex on its workstation to start automatically whenever the workstation is booted.

- **Add QIndex to the Launcher navigation bar.** You can place QIndex on the navigation bar and access it as if it were any other process. (For instructions, see the “Customizing the Navigation Bar” chapter of the Launcher Configuration Guide.)

- **Customize the Launcher in the Start Up tab.** This method starts QIndex whenever you start Horizon on the machine you customize. (For instructions on setting up startup options in the Launcher, see “Adding a Startup Folder or Process” in the “Customizing Startup Settings” chapter of the Launcher Configuration Guide.)

- **Start QIndex from a command line.** This method requires you to enter commands to start the QIndex program. (For information on how to start QIndex from a command line, see “Starting QIndex Manually” on page S-134.)

This section explains these topics:

- Starting QIndex Automatically
Starting QIndex Manually

Starting QIndex Automatically

You set up QIndex to start automatically by placing a QIndex shortcut in the Windows startup folder. When you do this task, you first create a shortcut defining the QIndex parameters, and then copy this shortcut into the Windows startup folder.

*WARNING*

If you set up QIndex to start automatically through the Windows startup folder, make sure you have reliable, physical security on your machine.

To start QIndex automatically

1. Use Windows Explorer to find QIndex.exe in the Horizon executables folder on your network.
2. Right-click on QIndex.exe.
3. Choose Create Shortcut.
   Windows automatically creates a new executable named “Shortcut to QIndex.”
4. Right-click on Shortcut to QIndex.
5. Choose Properties.
   Windows displays the Shortcut to QIndex Properties window.
6. Click the Shortcut tab.
   Windows displays this screen:

   ![Shortcut to QIndex Properties](image)

   Enter the QIndex parameters here.

7. At the end of the Target field, after the location of the QIndex file, add a space and enter these QIndex parameters:

   `/server/username/password/database  /queue`
Understanding Deferred Indexing

For example, enter these QIndex parameters:

E:\Horizon70\QIndex.EXE /sLibServ/utab/psystem/ddocu /q1

These are the sample variables represented in the path:

<table>
<thead>
<tr>
<th>Switch</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>/s server</td>
<td>Specifies the server the QIndex program logs on to. Enter a space before the forward slash ( / ).</td>
</tr>
<tr>
<td>/u user</td>
<td>Specifies the user name or ID required to log on to the database.</td>
</tr>
<tr>
<td>/p password</td>
<td>Specifies the password required to log on to the database.</td>
</tr>
<tr>
<td>/d database</td>
<td>Specifies the database QIndex logs on to.</td>
</tr>
<tr>
<td>/q queue list</td>
<td>Queue list in comma delimited format. (Queue list defaults to all queues greater than 0.)</td>
</tr>
</tbody>
</table>

8 Click OK.
9 Copy the shortcut you created for QIndex.
10 Open the Windows Explorer.
11 Double-click the WINNT directory.
12 Double-click the Profiles directory.
13 If you have Windows 2000, double-click the slh.STAR directory; if you have Windows NT, double-click the All Users directory.
14 Double-click the Start Menu directory.
15 Double-click the Programs directory.
16 In Windows NT, double-click the Startup directory.
17 Right-click in the contents space of the directory and choose Paste.

Starting QIndex Manually

If you did not set up QIndex to start automatically when you boot your QIndex workstation or when you log on to Horizon at your QIndex workstation, you need to start QIndex manually at the beginning of each day. (For information on setting up QIndex to start automatically, see “Starting QIndex Automatically” on page S-133.)

You start QIndex manually from a command line. You can minimize the command window you start manually, but do not close it. QIndex stops when you close the command window.
To start QIndex manually

1. Log in to Horizon.

   **NOTE**
   
   You can start QIndex from a command line without starting Horizon, but you need to specify the “spud” parameters and the queue (/\server/\user/\password/\database/\queue) from the command line after entering the path to the QIndex.exe.

2. Do one of these options:
   - If you want to start QIndex from the navigation bar, activate the QIndex menu process that you set up.
     
     (For instructions on adding QIndex to the navigation bar, see “Adding an Application to a Folder” in the “Customizing the Navigation Bar” chapter of the Launcher Configuration Guide.)
     
     Do not close the QIndex window until you want to stop QIndex. The task is finished.
   - If you want to start QIndex from a command line, open the command prompt and continue with step 3.
     
     (For instructions on opening a command prompt, see your operating system user’s guide.)

3. Enter the path to the QIndex.exe stored on your database, and assign a queue to this QIndex:
   
   Drive:\Horizon Folder\QIndex executable /Queue for this QIndex
   
   For example, enter this:
   
   E:\Horizon70\QIndex.exe /\q1
   
   Add a space here.

   These are the sample variables in this path:

<table>
<thead>
<tr>
<th>Parts of the Path</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive</td>
<td>The drive where your Horizon executables are stored.</td>
</tr>
<tr>
<td>Horizon Folder</td>
<td>A subdirectory in the drive where Horizon is stored.</td>
</tr>
<tr>
<td>QIndex executable</td>
<td>This is the QIndex.exe stored in the Horizon folder.</td>
</tr>
<tr>
<td>/Queue for this QIndex</td>
<td>This assigns the queue. Enter a space before the forward slash ( / ).</td>
</tr>
</tbody>
</table>

   You can minimize the command window that is running QIndex, but do not close it.
Using Deferred Indexing

After you assign your indexes to a queue and set up QIndex, you are ready to use deferred indexing. Horizon has several features that help you monitor deferred indexing. (For example, you may need to search for indexes with an active queue or you may need to stop QIndex.)

**IMPORTANT**

If you delete a bib record that has indexes you have deferred, this will not effect the database server or deferred indexing. When you delete the record, Horizon ignores the queue setting and de-indexes all indexes immediately.

This section explains these topics:
- Viewing Statues of Indexes and QIndex
- Stopping QIndex

Viewing Statues of Indexes and QIndex

You can view the statuses of indexes and QIndex. This means that you can verify which indexes are in a deferred queue, or check whether QIndex is running on a specific index or on a group of indexes. You need to know this information if you decide to change one or more deferred indexes back to queue 0 so that Horizon can index them immediately. (You cannot change a deferred index to queue 0 when there is an active QIndex instance processing the deferred queue or if there are any rows in the queue.)

This section explains these topics:
- Viewing Which Indexes Are in a Queue
- Checking Whether QIndex Is Active on a Specific Index
- Viewing All Indexes with an Active QIndex

Viewing Which Indexes Are in a Queue

To help you keep track of which indexes are in a deferred queue, you can view a list of indexes in a queue.

To view which indexes are in a queue

1. Open the `mq_index` view in the Table Editor, or start the Indexes process. The default location of this process is the `Administration\Index Control Menu` folder on the navigation bar.
2. Do one of these options to display the Search menu:
   - Press `CTRL+F2`.
   - Choose File, Search.
3 In the **Indexes** list, find and highlight **Queue**:

4 In the **Search For** field, enter the queue you want to view.
   (For example, enter “1”.)

5 Click **OK**.
   If there are indexes assigned to the queue you entered in the Search for field, Horizon displays the List Horizon Index Definitions window showing a list of the indexes.

### Checking Whether QIndex Is Active on a Specific Index

You can check to see if QIndex is active on a specific index. You need to do this if you want to change a deferred index to non-deferred. (For example, you may want to change a queue assignment for a single index, if you decide the deferred index is essential to your cataloging staff during cataloging.) You cannot change a queue assignment when there is an active QIndex on the deferred queue.

**To check whether QIndex is active on a specific index**

1 Open the **mq_index** view in the Table Editor, or start the **Indexes** process.
   The default location of this process is the Administration\Index Control Menu folder on the navigation bar.

2 Choose the **mq_index** you want.
   Horizon displays the Edit Horizon Index Definitions window.
Click Page Down or resize the window to display the Queue field:

The Active field tells you if there is an active QIndex on that index.

Look in the Active field.

If there is an active QIndex for this index, the Active field displays “Yes”; otherwise, the field displays “No.” You cannot edit this field.

Viewing All Indexes with an Active QIndex

You may find it necessary to change a queue assignment for several indexes. (For example, you may decide to change several deferred indexes to a non-deferred status.) Because you cannot change a queue assignment when there is an active QIndex on the deferred queue, you need to find out which index groups have an active QIndex. You can check to see if there is an active QIndex on the group of indexes you want to change by using the Search menu or by using the Display menu.

This section explains these topics:

- Using the Search Menu to View All Indexes with an Active QIndex
- Using the Display Button to View All Indexes with an Active QIndex

To use the Search menu to view all indexes with an active QIndex

1. Open the mq_index view in the Table Editor, or start the Indexes process.
   The default location of this process is the Administration\Index Control Menu folder on the navigation bar.
2. Do one of these options to display the Search menu:
   - Press CTRL+F2.
   - Choose File, Search.
3 In the Indexes list, find and highlight Active:

4 In the Search for field, mark Yes.

5 Click OK.

6 Do one of these tasks:

<table>
<thead>
<tr>
<th>If there is an active QIndex</th>
<th>If there is no active QIndex</th>
</tr>
</thead>
<tbody>
<tr>
<td>Horizon displays the List Horizon Index Definitions window with all active mq_indexes displayed. You can use the Display button to display additional information in the window. (For example, you can add the queue and active fields to display in the window.)</td>
<td>Horizon displays this message:</td>
</tr>
<tr>
<td>1 Click OK.</td>
<td>1 Click OK.</td>
</tr>
<tr>
<td>2 Click Cancel to close the Search menu.</td>
<td></td>
</tr>
</tbody>
</table>

To use the Display button to view all indexes with an active QIndex

1 Open the mq_index view in the Table Editor, or start the Indexes process. The default location of this process is the Administration\Index Control Menu folder on the navigation bar. Horizon displays the List Horizon Index Definitions window showing all of the indexes you have created.

2 Click Display. Horizon displays the Set Columns and Properties for Display window.

3 In the Choose columns to display column, highlight Queue and Active.

4 Click OK.
Understanding Deferred Indexing

Horizon redisplays the List Horizon Index Definitions window with the Queue and Active columns added to the window:

5. Use the scroll bar to find the index whose active queue status you want to view. A check mark means QIndex is active for that index.

Stopping QIndex

If you need to, you can stop the QIndex utility that is processing a queue. (For example, you need to stop QIndex if you find it necessary to reboot the machine. You also need to stop the QIndex utility to make certain kinds of adjustments to deferred index queue assignments.)

**NOTE**

Stopping QIndex on any index stops QIndex for the entire queue.

If you have multiple queues assigned to QIndex and you stop QIndex, Horizon will stop processing all of the queues assigned to that QIndex session.

**To stop QIndex**

1. Open the `mq_index` view in the Table Editor, or start the **Indexes** process.
   The default location of this process is the **Administration\Index Control Menu** folder on the navigation bar.

2. Choose any index that is assigned to the queue you want to stop.
   Horizon displays the Edit Horizon Index Definitions window.
3 Click **Page Down** or resize the window to display the **Queue** field:

![Edit Horizon Index Definitions](image)

4 Mark the **Stop Queue's Indexer** box.

**IMPORTANT**

Marking the Stop Queue’s Indexer box stops processing on all indexes assigned to that queue.

5 Save your changes.

6 Close the List Horizon Index Definitions window to have your changes take effect.

**IMPORTANT**

Remember to start QIndex again. (For instructions, see “Starting QIndex” on page S-132 or “Starting QIndex Manually” on page S-134.)
Setting Up Complex Deferred Indexing

*WARNING*

Setting up multiple deferred queues is a complex process that requires strong knowledge of indexing principles and SQL Advantage. If you do not have such knowledge, do not set up multiple deferred queues. Otherwise, the integrity of your indexes may become corrupt.

In some cases, even after you set up and use deferred indexing, your QIndex workstation may still process indexes slowly. You may be able to solve this problem by creating multiple deferred queues. You create multiple deferred queues by dividing one deferred queue into multiple queues. This process is called “splitting a queue.” (For more information on this process, see “Splitting a Queue” on page S-145.)

Use multiple deferred queues only if you meet all of these criteria:

- You have substantial experience administering one immediate and one deferred queue.
- Your deferred queue on the QIndex workstation is running many hours behind the indexes being processed on your technical workstation.
- You have enough available workstations to be able to devote one to each new deferred queue that you set up.

*IMPORTANT*

Do not set up multiple queues unless you have already set up deferred indexing as explained in “Setting Up Deferred Indexing” on page S-128 (one immediate queue and one deferred queue) and found the results unsatisfactory.

Here is an example of how complex deferred indexing works:

As with only one deferred queue, your technical workstation processes the non-deferred queue. The other workstations are each dedicated to one QIndex utility processing a deferred queue.
Although queues are assigned with a number, they do not take on a priority value. Rather, the number is just the “name” assigned to the queue. Thus, queue 2 can process before queue 1, and so forth, if you have multiple queues. (Remember that queue 0 is not a deferred queue and is always indexed immediately.)

This section explains these topics:

- Experimenting with Complex Deferred Indexing
- Splitting a Queue
- Assigning Multiple Queues to One QIndex

**Experimenting with Complex Deferred Indexing**

Complex deferred indexing is difficult because there is no single established solution. You must experiment to discover the best solution for your library, including the number of queues necessary and which indexes to assign to additional queues. (For example, you can experiment by placing a small group of indexes into the additional queue to have them indexed more quickly. You might also try placing the most time-consuming indexes in the additional queue so you have equally balanced queues.)

You can perform queries to learn important information about a queue. From this information, you can decide which indexes to place in the new queue when you split your existing queue. (For example, you can perform a query to tell you how long the oldest entry has been waiting in the queue. Another useful query is one that tells you how many entries are in a queue.)

This section explains these topics:

- Finding the Length of a Deferred Indexing Queue
- Determining How Long the Oldest Entry Has Waited in a Deferred Indexing Queue

**Finding the Length of a Deferred Indexing Queue**

You can use SQL to perform a query that tells you the length of a queue.

**To find the length of a deferred indexing queue**

1. Open and log in to SQL Advantage.
2. Enter this command:

   ```sql
   select x.mq_index, x.queue, entries = count (*)
   from mq_index x, mq_index_queue q
   where x.mq_index = q.mq_index
   group by x.mq_index, x.queue
   ```

   SQL Advantage displays the result of the query.

   Here is a sample result list from this query:

<table>
<thead>
<tr>
<th>mq_index</th>
<th>queue</th>
<th>entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>bibkw</td>
<td>1</td>
<td>170</td>
</tr>
<tr>
<td>auth</td>
<td>1</td>
<td>179</td>
</tr>
<tr>
<td>unifath</td>
<td>1</td>
<td>106</td>
</tr>
<tr>
<td>subject</td>
<td>1</td>
<td>80</td>
</tr>
</tbody>
</table>

   In this example, there are 170 bib records saved that may have a bibkw index to update.
Understanding Deferred Indexing

Determining How Long the Oldest Entry Has Waited in a Deferred Indexing Queue

You can use SQL to perform a query that tells you how long an entry has been waiting for indexing.

To determine how long the oldest entry has waited in a deferred indexing queue

1. Open and log in to SQL Advantage.
2. Enter this command:
   ```sql
   select q.mq_index, x.queue, oldest_entry = min (q.save_time)
   from mq_index_queue q, mq_index x
   where q.mq_index = x.mq_index
   group by q.mq_index, x.queue
   order by x.queue, q.mq_index
   ```

   Here is an example of the results of this query:

<table>
<thead>
<tr>
<th>mq_index</th>
<th>queue</th>
<th>oldest_entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>altitle</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>author</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>mesh</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>series</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>subject</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>bibkw</td>
<td>2</td>
<td>Mar 29 2002 11:55</td>
</tr>
<tr>
<td>unifath</td>
<td>2</td>
<td>Mar 29 2002 11:55</td>
</tr>
<tr>
<td>unifbib</td>
<td>2</td>
<td>Mar 29 2002 11:55</td>
</tr>
</tbody>
</table>

The results of this example indicate that you have reasonably balanced queues. You split a queue with these results only if you want to have a small group of indexes indexed more quickly.
This example shows results of the same query with a queue that is significantly behind:

<table>
<thead>
<tr>
<th>mq_index</th>
<th>queue</th>
<th>oldest_entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>alttitle</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>author</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>mesh</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>series</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>subject</td>
<td>1</td>
<td>Mar 29 2002 11:41</td>
</tr>
<tr>
<td>bibkw</td>
<td>2</td>
<td>Mar 29 2002 6:55</td>
</tr>
<tr>
<td>unifath</td>
<td>2</td>
<td>Mar 29 2002 6:55</td>
</tr>
<tr>
<td>unifbib</td>
<td>2</td>
<td>Mar 29 2002 6:55</td>
</tr>
</tbody>
</table>

In this example, the queues are very unbalanced because queue 2 is approximately seven hours behind queue 1. This might indicate that there are some complex indexes in this queue. (Complex indexes involve multiple tags, subfields, and MARC maps for indexing.) From this result, you might decide to split queue two.

**Splitting a Queue**

Once you have determined how you want to set up complex deferred indexing, you split your existing queue to create two or more new queues. Each new queue you create requires its own QIndex workstation.

**To split a queue**

1. If you want to split a queue that a queue indexer is currently processing, stop the queue indexer that is running on that queue.
   (For instructions, see “Stopping QIndex” on page S-140.)

2. Open the **mq_index** view in the Table Editor, or start the **Indexes** process.
   The default location of this process is the **Administration\Index Control Menu** folder on the navigation bar.

3. Do one of these options to display the Search menu:
   - Press **CTRL+F2**.
   - Choose **File, Search**.

4. Highlight **Queue**.

5. In the **Search for** field, enter the queue you want to split.
   (For example, enter “1” to search for queue 1.)

6. Click **OK**.
   Horizon displays the List Horizon Index Definitions window. All of the **mq_index** entries are displayed for the queue you entered in the Search for field.
Understanding Deferred Indexing

6  Do one of these options:

<table>
<thead>
<tr>
<th>To assign one index to the new queue</th>
<th>To assign multiple indexes to the new queue</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Choose the index you want to assign to a new queue. Horizon displays the Edit Horizon Index Definitions window.</td>
<td>1 Choose all of the indexes you want to assign to the new queue. Horizon displays a Batch Change message.</td>
</tr>
<tr>
<td>2 Click Page Down or resize the window to display the Queue field.</td>
<td>2 Click OK. Horizon displays the Batch Change Horizon Index Definitions window.</td>
</tr>
</tbody>
</table>

7  In the Queue field, enter the new queue that you want to assign to the indexes. (For example, enter “2”. Remember that although queues are assigned with a number, they do not take on a priority value. The number is just the “name” assigned to the queue.)

8  Save your changes.

**NOTE**

Once you have split a queue, you need to set up a new QIndex on a separate workstation for each new queue you have created. (For example, if you chose to have QIndex for queue 1 start automatically, set up QIndex for queue 2 to also start automatically.) (For information about setting up QIndex, see “Starting QIndex” on page S-132.)

Assigning Multiple Queues to One QIndex

If necessary, you can assign multiple queues to one QIndex. You should do this only if you have split a queue and then decide the split is no longer necessary. (For example, if you split queue 1 into queues 1, 2, and 3 and then decide that you really do not need queue 3, you can assign queue 3 to the same QIndex that runs either queue 1 or queue 2.)

You assign multiple queues to a queue indexer from the command line or by creating or editing the QIndex.BAT file.

**WARNING**

If you have multiple queues assigned to QIndex and you stop QIndex, Horizon will stop processing all of the queues assigned to that QIndex session. (For example, if you have queues 1, 2, and 5 assigned to one QIndex and you decide to stop queue 2, Horizon stops all processing on queues 1, 2, and 5 because one QIndex program is handling all three queues.)
This section explains these topics:

- Assigning Multiple Queues to QIndex from the QIndex.BAT File
- Assigning Multiple Queues to QIndex from a Command Line

**Assigning Multiple Queues to QIndex from the QIndex.BAT File**

When you assign multiple queues to QIndex from the QIndex.BAT file, this change is permanent. The multiple queues become active every time you activate QIndex.

**To create a QIndex.BAT file**

1. Choose **Start, Programs, Accessories, Notepad**. Windows opens a blank Notepad file.
2. Enter the path to QIndex.exe stored in your Horizon folder, and assign a queue:
   
   \texttt{Drive}: \Horizon Folder\QIndex /q\text{Queue for this QIndex}
   
   For example, enter this:
   
   \texttt{E:}\Horizon70\QIndex /q1
   
   Add a space here.
   
   These are the sample variables represented in the path:
   
<table>
<thead>
<tr>
<th>Parts of the Path</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive</td>
<td>The drive where your Horizon executables are stored.</td>
</tr>
<tr>
<td>Horizon Folder</td>
<td>A subdirectory in the drive where Horizon is stored.</td>
</tr>
<tr>
<td>QIndex</td>
<td>This is the QIndex.exe stored in your Horizon folder.</td>
</tr>
<tr>
<td>Queue for this QIndex</td>
<td>Enter the queue you want assigned to this QIndex. Enter a space before the forward slash ( / ).</td>
</tr>
</tbody>
</table>

3. Save the file where your other Horizon executables are stored.
   
   Save this file with a name you will remember (for example, QIndex). Windows automatically adds the .BAT extension to your file.

**To assign multiple queues to QIndex from the Qindex.BAT file**

1. Use Notepad to open your “QIndex.BAT” file.
   (For instructions, see your Windows user’s guide.)
2. Add multiple queues separated by commas to the end of the path:
   
   \texttt{Drive}: \Horizon Folder\QIndex /q\text{Queues for this QIndex}
   
   For example, enter this:
   
   \texttt{E:}\Horizon70\QIndex /q1,3
   
   Add a space here.
Understanding Deferred Indexing

Here are the sample variables in this path:

<table>
<thead>
<tr>
<th>Parts of the Path</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E:</td>
<td>The drive where your Horizon executables are stored.</td>
</tr>
<tr>
<td>Horizon70</td>
<td>A subdirectory in the drive where Horizon is stored.</td>
</tr>
<tr>
<td>QIndex</td>
<td>This is the QIndex.exe stored in the Horizon folder.</td>
</tr>
<tr>
<td>/q1,3</td>
<td>The queues assigned to this QIndex.</td>
</tr>
</tbody>
</table>

3. Save your changes.

**Assigning Multiple Queues to QIndex from a Command Line**

When you assign multiple queues to a single QIndex from a command line, that QIndex will handle the queues as long as that instance of QIndex is running; this change is not permanent. (For example, if you use a command line to assign queue 3 to the same QIndex that is handling queue 1, that QIndex now handles both queues as long as it is running. However, the next time you open a QIndex, it will only process queue 1.)

**To assign multiple queues to QIndex from a command line**

1. If QIndex is running, stop QIndex.
   (For instructions, see “Stopping QIndex” on page S-140.) You must stop QIndex before you change any queue assignments, but leave Horizon running.
2. Open a command prompt.
3. On the command line enter a path like this one:
   ```plaintext
   Drive:\Horizon Folder\QIndex /qQueues for this QIndex
   ```
   For example, enter this:
   ```plaintext
   E:\Horizon70\QIndex /q1,3
   ```
   Add a space here.

Here are the sample variables in this path:

<table>
<thead>
<tr>
<th>Parts of the Path</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E:</td>
<td>The drive where your Horizon executables are stored.</td>
</tr>
<tr>
<td>Horizon70</td>
<td>A subdirectory in the drive where Horizon is stored.</td>
</tr>
<tr>
<td>QIndex</td>
<td>This is the QIndex.exe stored in the Horizon folder.</td>
</tr>
<tr>
<td>/q1,3</td>
<td>The queues assigned to this QIndex. Enter a space before the forward slash ( / ).</td>
</tr>
</tbody>
</table>
Minimize the command window.

**Deferred Indexing Errors**

There are certain `mq_indexes` that must be assigned to certain queues. If you try to enter an incorrect queue assignment, Horizon may display an error message. This table lists the error messages you may see while using deferred indexing:

<table>
<thead>
<tr>
<th>Error name</th>
<th>Error message</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active queue error</td>
<td>Cannot change queue value when queue is active. Shut down QIndex before changing queue setting.</td>
<td>Active <code>mq_index</code> rows cannot be assigned to a different queue. You must first stop the queue indexer before changing the queue setting.</td>
</tr>
<tr>
<td>Awaiting processing error</td>
<td>Cannot change queue value from deferred (&gt; 0) to zero when <code>mq_index_queue</code> entries exist for the <code>mq_index</code> in question.</td>
<td>There cannot be any pending queue entries for a deferred index when you change the queue assignment to queue 0. You must let QIndex completely empty the queue before you change the queue assignment of the index back to zero.</td>
</tr>
<tr>
<td>Change parent value error</td>
<td>Cannot change queue value of <code>mq_indexes</code> which depend on parent <code>mq_indexes</code>; change queue value of parent index instead.</td>
<td>In Horizon, an index_table_name (a child index) of one row in the <code>mq_index</code> can have the same name as a base_index_table (a parent index) for another row. If this happens, these related rows must be assigned to the same queue. (If a parent and child index were in different queues, corresponding information could not be inserted into the child index.) You can change the queue setting of a parent row. Whenever a parent queue is changed, the trigger changes queue settings of all child rows to match the new queue of the parent.</td>
</tr>
</tbody>
</table>

**IMPORTANT**

When you assign queues from a command line, QIndex only handles your queues as long as it is running for the current session from which you assigned the queues. If you want to assign the queues permanently, make the change in the QIndex.BAT file or change the queue assignments in the `mq_index` view. (For instructions, see “Assigning Multiple Queues to QIndex from the QIndex.BAT File” on page S-147 or “Assigning Indexes for Deferred Indexing” on page S-130.)

---

**NOTE**

This restriction does not apply to complex queues. (For example, you can change an index from queue 1 to 2 without emptying the queue after you stop the QIndex session that is handling queue 1.) (For more information on multiple queues, see “Setting Up Complex Deferred Indexing” on page S-142.)
Displaying Horizon in a Right-to-Left Layout

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>Error name</th>
<th>Error message</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional role error</td>
<td>When index &amp; base table names are the same, queue value must be zero.</td>
<td>There are some cases where an mq_index exists to perform processing functions on the base table itself. In such cases, the processing functions must occur before the record is saved. If not, the record may be inserted into the wrong place in the table.</td>
</tr>
<tr>
<td>Match point error</td>
<td>Mq_indexes which are match points must be assigned to queue zero.</td>
<td>Any delay in fully populating the data used for matching could disrupt matching or linking during an import.</td>
</tr>
<tr>
<td>Non-MARC error</td>
<td>Queue value must be zero for non-MARC base tables.</td>
<td>Only MARC data can be indexed in a deferred fashion. Any non-MARC data, such as borrower or item information, must be indexed immediately.</td>
</tr>
</tbody>
</table>

Displaying Horizon in a Right-to-Left Layout
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:

The MARC Editor displays its windows in right-to-left sequence.

Tags and labels 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.
Displaying Horizon in a Right-to-Left Layout

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 that 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.

---

**To display Horizon in a right-to-left layout**

1. Find the official Microsoft language code for the language you want to use in Horizon. For a complete list of languages and their codes, go to the “msdn.microsoft.com” web site and use the search tool to search for “Language Code and Scripts”. Include the quotes (“ “) in your search.

2. If you have not already done so, log in to Horizon as a system administration user.

3. Start the Interface Language process.

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

   Horizon displays the List Interface Languages window, showing the languages currently set up on your system.

4. Make a note of the highest order number in the list.

5. Choose the language you want, or create a new interface language.

   Horizon displays the Edit Interface Language window:
Using Security in Cataloging

Library staff can only use Cataloging processes if you grant them access rights through Horizon Security. In addition, you can control how much access catalogers have to MARC records. (For example, you can limit a cataloger to only biographical records. You can even limit access to specific records, tags, or subfields.) You can also give catalogers CRUDO rights—the rights to create, read, update, or delete records or subfields, or the right to own a record.

Horizon uses this 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. Third, for processes that use record ownership, Horizon determines whether the user has rights for the current record. Finally, Horizon may further restrict rights for editing the record based on CRUDO settings. You set up privileges, permissions, and CRUDO settings when you set up roles and passkeys.

You need a thorough understanding of these things before you set up security for Cataloging. (For more information and instructions, see “Securing Horizon” in the “Security and Preferences” chapter of the System Administration Guide.)
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