

# 1. Macro Express Documentation

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## 1. Macro Express Documentation

Macro Express Documentation includes maps to locally assigned function keys and key sequences, general guidelines for expert users for tuning up the program on new workstations, and training materials.

Links:

[Complete Macro Express Keyboard Assignments, Including Currently Unassigned Key Combinations, No Annotations](#) [1] (Excel)

[Basic Macro Express Function Keys Keyboard Template](#) [2] (Word; requires legal size paper)

**Effective Date:** February 11, 2014

## Basic Macro Express Function Keys

REV:02/12/09 All in Cataloging Module unless otherwise indicated

Key	Action	Notes
F1	Activates Override macro	CIRC MODULE ONLY: Automatically enters Override Popup windows
Ctrl+F1	Closes all records	Cursor can be anywhere in an activated window.
Shift+F2	Retrieves Headings window	Cursor can be anywhere in an activated window
Ctrl+F2	Copy record ID	Copies record ID of bib, MFHD, or item record displayed
Shift+F3	Retrieves Titles window	Cursor can be anywhere in an activated window
Shift+F4	Adds (LC) to the end of the call number	Click on the selection column at the 852 field; runs whether or not the 852 field is highlighted, but selection column arrow must be pointing to 852. Run after the basic call number has been pasted into 852 $\ddagger$ h and $\ddagger$ i
F5	Open MFHD or MFHD dialog box	Cursor can be anywhere in an activated bib or item record. MFHD opens if single MFHD; dialog box opens if multiple MFHDs.
Shift+F5	Adds (LC)+ $\ddagger$ m Oversize	Click on the selection column at the 852 field; runs whether or not the 852 field is highlighted, but selection column arrow must be pointing to 852. Run after the basic call number has been pasted into 852 $\ddagger$ h and $\ddagger$ i
Ctrl+F5	Adds + $\ddagger$ m Oversize	Click on the selection column at the 852 field; runs whether or not the 852 field is highlighted, but selection column arrow must be pointing to 852. Run after the basic call number has been pasted into 852 $\ddagger$ h and $\ddagger$ i
F6	Retrieves bib rec from MFHD	Cursor can be anywhere in an activated MFHD or item record
Shift+F6	Enters 866 field (with indicators)	Position cursor in any cell of preceding field or in selection column of preceding field
Ctrl+F6	Creates new MFHD	Cursor can be anywhere in an activated bibliographic record
F7	In Circ module, enters your most heavily used patron code	You need to identify your most heavily used patron code and enter it in the script loaded on your workstation
F7	Opens retrieve barcode window	Cursor can be anywhere in an activated window
Shift+F7	Retrieves item record(s)	Cursor can be anywhere in an activated MFHD record
Ctrl+F7	Creates new item record	Cursor can be anywhere in an activated bibliographic or MFHD record

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Ctrl+F9	9xx delete	On bib record, deletes all 9xx except 950. Cursor can be anywhere in the activated bib window.
F10	Opens Search window	Cursor can be anywhere in an activated window (should also work if a subwindow is open)
Shift+F10		Formerly Remote connection to LCDB; this hotkey is now open for customization
Ctrl+F10	Converts EAN to ISBN	CAT MODULE: Open search window, select ISBN index & position cursor in Search for; wand the EAN barcode
F11		Formerly Open RLIN IMP file; this hotkey is now open for customization
Shift+F11	Open OCLCIMP file	Cursor can be anywhere in an activated window (should also work if a subwindow is open).
F12	Opens POPUP MENU	If cursor needs to be positioned, insert before activating the menu. When the menu is activated, either double-click on the macro name or enter the number or letter associated with the macro.
Shift+F12	Adds ‡dCtY to 040 field	Cursor can be anywhere in 040 EXCEPT beginning of field Modify MARC21 location code if necessary
Ctrl+F12	Inserts 040 CtY‡cCtY above field selected	Cursor can be anywhere in the succeeding field. Modify MARC21 location code if necessary
Shift + Delete key	Erase End of Field	Deletes all text to the right of the cursor in a given variable field.
Shift + Insert key	Opens window of subsequent next title (and closes the top window)	Use when multiple titles are retrieved from a search. From the Titles List window, select and open window for a title. From the bib window of the title selected, running the macro will open the next window and close the top window.
Ctrl + Insert key	Opens previous window from title list (and closes the top window)	Use when multiple titles are retrieved from a search. From the Titles List window, select and open window for a title. From the bib window of the title selected, running the macro will open the previous window and close the top window.
Ctrl + Keypad 5	Switches Macro File	Switches to master1.1D.mex file if master1.1N.mex is up; switches to master1.1N.mex if master1.1D.mex is up. (Switching to master1.1N.mex allows use of number pad)

Last modified: Friday, August 4, 2017 - 10:01am

## Macro Express Hot Function Keys

- Unless otherwise noted, all functions are active only in the Cataloging Module. Unless otherwise noted, cursor position is irrelevant
- Nickname and Key Sequence based on master5.mex file.
- If a Hotkey is designated as NO ACTIVATION, assign to an unreserved key sequence within range: Ctrl+Shift, Alt+Shift, or Win+Ctrl.
- Unactivated and activated keys may also be assigned to a Popup Menu.
- DISABLED keys display in italicized form in the MacroExpress Macro List. To enable, Select-->Right Click-->Click on Enable Macro

NICKNAME	HOTKEY	ACTION AND NOTES?
<b>ACQUISITIONS FOLDER</b>		
852  x Gift	No Activation	Inserts ‡x Gift staff note. Cursor can be anywhere in the MFHD record.
852 In Process	No Activation	Inserts ‡h In Process after ‡b <location>. Note this deletes all text

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		after <location>. Cursor can be anywhere in the MFHD record.
852 On Order	No Activation	Inserts ‡h On Order after ‡b <location>. Note this deletes all text after <location>. Cursor can be anywhere in the MFHD record.
866 receipt	Win+F6	For acquisition multipart & serial receipts: enters 866 with BLANK indicators. Position cursor in any cell of preceding field or in selection column of preceding field.
866 receiptrev	No Activation	<i>For acquisition multipart &amp; serial receipts: inserts 866 with BLANK indicators below 852. Cursor can be anywhere in the MFHD record.</i>
900 del (not 950)	Ctrl+F9	Deletes all 9xx fields except 950. Use to clean up vendor bibliographic records. Use either prior to exporting (saving) vendor record into Orbis or on vendor records already in Orbis. <b>DO NOT USE ON CATALOGED RECORDS</b>
<i>Change Template: Books [Cartographic, CDAudio, CDRoms, DVD, Map, Microfilm, Serials, Videocassette</i>	No Activation	<i>8 separate macros. Changes the bibliographic record template to the selected format and creates a new record from the new template.</i>
Frontlog	No Activation	<i>From the Circ. Module, prompts for item record barcode number. When barcode is wanded, overrides the 2 prompts and saves the charge. Toggles up the Cataloging Module, retrieves the MFHD, pastes UNCAT in 852 ‡h and prompts for Frontlog barcode number. When the Frontlog number is wanded, pastes in the number after UNCAT and saves the new UNCAT number to the database. Toggles up the Circ. Module and prompts for the next item record barcode number. 1. Circ. Module and Cataloging Module must be running. No windows may be running in the Cataloging Module. The macro will not run if the item is already charged to the same patron code. 2. Begin in the Circ. Module. Enter</i>

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		<p><i>the appropriate patron code and start the macro. A window will open prompting for the item barcode number. (While the macro is running, a running figure will replace the Macro Express icon in the Start tray at the bottom of the Windows display.)</i></p> <p><i>3. Wand the item record barcode number. The program will enter both overrides and save the item record to the new status (dummy patron), toggle up the Cataloging Module, retrieve the item record and use it to bring up the MFHD, paste UNCAT into 852 ¢h, and open a window prompting for the Frontlog barcode number: Please enter UNCAT number. Or, enter "l" to change to "smlInb" or "a" to "art" from "sml"</i></p> <p><i>4. The default location in 852 ¢b is sml. If sml is the correct location, wand the Frontlog barcode. The program will paste the number after UNCAT, save the MFHD to the database, close all open windows within the Cataloging Module, toggle up the Circ. Module, and re-open the window prompting for the next item record barcode number.</i></p> <p><i>5. To abort the macro, right click on the icon of the running figure in the Start tray at the bottom of the main window. The figure will be replaced by the Macro Express icon.</i></p> <p><i>6. The current macro runs on the condition that 852 is the first variable field in the MFHD. If there are 014 fields in the MFHD, the macro will hang up at that point. To continue, close the error message window and wand the Frontlog barcode. Then restart the macro. The MFHD with UNCAT&lt;Frontlog number&gt; will be saved, and the program will toggle up the Circ. Module and open the prompt for the next item record barcode charge.</i></p>
<i>Frontlog art</i>	<i>No Activation</i>	<i>DO NOT EDIT OR DISABLE. Used by the Frontlog macro. (Replaces default sml location with art location)</i>
<i>Frontlog Inb</i>	<i>No Activation</i>	<i>DO NOT EDIT OR DISABLE. Used by the Frontlog macro. (Replaces default sml location with smlInb location)</i>
<i>MFHD In Process</i>	<i>Alt+Shift+F8</i>	<i>Inserts ¢h In Process after ¢b &lt;location&gt;. Note this deletes all text</i>

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		after <location>.
MFHD On Order	Ctrl+Alt+F8	Same as 852 On Order, but mapped to a HotKey.
POPUP ACQ	Popup Menu F12	<p>Heavily used Acquisitions macros. Position cursor where specific macro requires. Press function key to open the PopUp menu. With mouse, doubleclick on the appropriate macro to run it. Or type the number or letter in the column to the left of the macro nickname to run it.</p> <p>Macro does not require an activation (hotkey) to run from the PopUp menu.</p> <p>To change macros on the menu, double click on the PopUp Menu line in the macro list and click on the directional arrows to move or remove macros. You will be prompted to save any reconfiguration.</p> <p>DISABLED.</p>
SUPPRESSED CIE	Ctrl+Shift+F7	<p>On 852, types 8 0 as first and second indicators and inserts ‡k Suppressed ‡h CIE ‡x Use MFHD after ‡b &lt;location&gt;.</p> <p>Cursor can be anywhere in the MFHD record.</p>
SUPPRESSED DESK COPY	Ctrl+Shift+F4	<p>On 852, types 8 0 as first and second indicators and inserts ‡k Suppressed ‡h Desk Copy after ‡b &lt;location&gt;.</p> <p>Cursor can be anywhere in the MFHD record.</p>
SUPPRESSED EXCHANGE	Ctrl+Shift+F11	<p>On 852, types 8 0 as first and second indicators and inserts ‡k Suppressed ‡h Exchange after ‡b &lt;location&gt;.</p> <p>Cursor can be anywhere in the MFHD record.</p>
SUPPRESSED LOST SML	No Activation	<p>On 852, types 8 0 in first and second indicators, replaces ‡b &lt;location&gt; with ‡b withdrawn ‡k Suppressed and inserts at the end of field 852 staff note ‡x sml: LOST mm/yy team/staff.</p> <p>Cursor can be anywhere in the MFHD record.</p>
SUPPRESSED OP	Ctrl+Shift+F10	<p>On 852, enters 8 0 in first and second indicators and inserts ‡k Suppressed ‡h OP after ‡b &lt;location&gt;. Cursor can be anywhere in the MFHD record.</p>
SUPPRESSED RETURNED	Ctrl+Shift+F9	<p>On 852, types 8 0 in first and second indicators and inserts ‡k Suppressed</p>

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		<p>‡h Returned after ‡b &lt;location&gt;. Cursor can be anywhere in the MFHD record.</p>
SUPPRESSED WITHDRAWN SML	Ctrl+Shift+F5	<p>On 852, enters 8 0 in first and second indicators, replaces ‡b &lt;location&gt; with ‡b withdrawn ‡k Suppressed and inserts at the end of field 852 staff note ‡x sml: WITHDRAWN mm/yy team/staff. Cursor can be anywhere in the MFHD record.</p>
<b>CIRCULATION FOLDER</b>		
Bound-With Linking	Win+Alt+L	<ol style="list-style-type: none"> <li>1. Retrieve all unlinked Bibliographic records you want to link to one MFHD/Item Record. All other records must be closed.</li> <li>2. Retrieve the Bibliographic record for the first title. It must be on top and maximized.</li> <li>3. Get holdings to retrieve the MFHD for the bound-with.</li> <li>4. Get item record to retrieve the Item Record for the bound-with.</li> <li>5. Run the macro.</li> </ol> <p>NOTE: The macro will make errors or fail if you try to do anything else on your computer while it is running. <b>DISABLED.</b></p>
Bulk Relinking	Win+Alt+I	<ol style="list-style-type: none"> <li>1. Copy the MFHD ID of the target MFHD using Ctrl-F2, or write the number down.</li> <li>2. Open the originating holdings record.</li> <li>3. Check for associated item records and count the number to relink. If you only want to relink some of the item records, rearrange them so they are the first ones on the list when you "get items".</li> <li>4. Run the macro.</li> <li>5. You are prompted to enter the holdings record id of the target MFHD.</li> <li>6. You are then prompted to enter the number of item records that need to be relinked.</li> <li>7. The macro then opens up the first item record, relinks it to the target holdings record, closes it, and repeats. It repeats the same number of times as the number entered in 6.</li> </ol> <p>NOTE: The macro will fail if you try to do anything else on your computer while it is running. <b>DISABLED.</b></p>
Charge to Prep (CIRC MODULE)	F7	<p>CIRC MODULE ONLY. Used primarily by units that employ dummy patron codes for status tracking.</p>

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		<p>Automatically opens the Charge window with the unit's PrepTeam patron code. Prior to use, the appropriate digits for the unit's PrepTeam code must be entered.</p> <p>TO PERFORM THE UPDATE:          Double click on the Charge to Prep line in the MacroExpress macro list. Then find Text Type: PRPTM**** in the Macro Script window and double click on that line of the script. Replace the asterisks with the appropriate digits. Click OK button, then Click on the Macro Explorer icon in the Actions window. When prompted to save, click OK. May be cloned or edited for other heavily used patron charges.</p>
Item Copy 0	Win+Alt+0	Changes the Item Record copy number to 0 <zero> and saves the record.
LSFC Item Type	No Activation	Changes Item Record item type to LSFC. CAUTION: should only be used by technical services units authorized to change item types to LSF, e.g. Divinity. Should NOT be used by SML Cataloging units.
LSFR Item Type	No Activation	Changes Item Record item type to LSFR. SEE CAUTION ABOVE.
New Barcode	Alt+Up Arrow	<p>Replaces Item Record barcode with new barcode. Open item record, run macro, scan in new barcode into Barcodes pop-up.</p> <p>NOTE: Don't use if you want to keep old barcode as Inactive since macro deletes old barcode.</p> <p>Works only if laser gun or wand automatically includes Enter at end of scan.</p>
New Item	Ctrl+F7	<p>Creates a new item record from the MFHD.</p> <p>CAUTION: can also create a new item record from the Bib record.</p>
Override (CIRC MODULE)	F1	<p>CIRC MODULE ONLY. Automatically overrides the 2 Voyager dialog boxes evoked whenever an item is charged or discharged, up to 100 items. The maximum number of charges can be edited.</p> <p>The macro should be turned on after the patron charge has been entered or after the discharge window has been opened. Once the macro is running, wanding the barcode will automatically charge or discharge the item and prompt for the next barcode. The macro is running when</p>

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		<p>an icon of a running figure replaces the standard MacroExpress icon in the start-up tray.</p> <p>CAUTION: this macro does not close until the maximum number of charges is reached, the user aborts the macro, or the macro times out (about 2 min. without activity). Until the macro closes, no other macros may be run. To abort the macro, right click on the running figure icon.</p>
Reference Item Type	No Activation	Changes Item Record item type to Reference, then puts cursor in Enum.
Relink One Item	Ctrl+F3	Brings up relink item to a different holding pop-up from Item Record.
<b>EDIT FOLDER</b>		
006ebooks	Win+Alt+F5	Creates standard 006 for ebooks. Conditions: no existing 006. Cursor can be anywhere in the bib record.
006eserials	Win+Alt+F7	Creates standard 006 for eserials. Conditions: no existing 006. Cursor can be anywhere in the bib record.
007ebooks	Win+Alt+F8	Creates standard 007 for ebooks. Conditions: no existing 007. Cursor can be anywhere in the bib record.
007eserials	Win+Alt+F10	Creates standard 007 for eserials. Conditions: no existing 007. Cursor can be anywhere in the bib record.
007microfilmserials	Win+Alt+F7	Creates standard 007 for microfilm serials. Conditions: no existing 007. Cursor can be anywhere in the bib record.
008ebooks	Win+Alt+F9	Creates standard 008 for ebooks. Conditions: Existing 008. Cursor can be anywhere in the bib record.
040	Ctrl+F12	Inserts 040 __ CtY±cCtY above the field selected. Position cursor in any cell of succeeding field or in selection column of succeeding field. Modify MARC21 location code if necessary.
040 Delimiter d CtY	Shift+F12	Adds ±d CtY to 040 field. Position cursor anywhere in variable portion of 040 EXCEPT the beginning of the field. (Will delete first variable field if cursor is positioned at the beginning of the 040 field). Modify MARC21 location code if necessary.
504 Bibliographical	Ctrl+F8	Creates 504 __ Includes bibliographical references and indexes. Position cursor in the preceding variable field. DISABLED.
504 Bibref with ( )	Ctrl+F8	Creates 504 __ Includes bibliographical references (p. [ ]-) and index. Position cursor in the preceding variable field.

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Erase End of Field	Shift+Delete	Deletes all text to the right of the cursor in variable fields (i.e., Bib or MFHD variable fields, and most text fields in the Item Record). NOTE: current setting restricts use to the Cataloging Module.
Fixed Field Default	Alt+Down Arrow	Replaces pipe character <no attempt to code> with default fixed field values in bibliographic records. Open 008 and position the cursor on first fixed field to be changed. Hold down Alt, press the Down Arrow, and release both keys. The macro adds the default value and moves to the next line. NOTE: Use mouse or down arrow to skip lines that don't have a pipe character. The macro will NOT work correctly if run on a fixed field containing some other value. Also works with pipe characters in 006 and 007 fixed fields. It does NOT work with the Leader.
LGBTQresource	Win+Alt+F12	Enters the LGBTQ local subject. Condition: Position cursor in the preceding variable field.
RDAFields	Win+Alt+R	Enters 300 and 3xx fields for books. Condition: Position cursor in the preceding variable field.
SwitchNODIACRITICS or SwitchDIACRITICS	Ctrl+Keypad 5	Default setting changes the macro express file from the diacritics+function keys file to the function keys only file. The key sequence will toggle between the two files. The file names need to be edited if the workstation default files are not the ones used in the macro. Switching to the function-key only file allows use of the number pad for numbers.
videorecording gmd	No Activation	Inserts text for 245 gmd: ‡h[videorecording]. Position cursor at the end of 245 ‡a.
<b>MFHD FOLDER</b>		
050 ‡h and ‡i with X	Ctrl+Alt+F12	For units that use trailing X with 050 00. For units that follow SML practice, this macro is only used if the 050 number does not get (LC) in 852. Preferences must be set to copy number from 050. Copies 050 (or 090 in the absence of 050) to 852 and adds X at the end of the last cutter. 050 00 only. 050 number must have

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		<p>date at the end, and there should be no ‡x or ‡z subfields in 852. Cursor can be anywhere in the MFHD record.</p> <p>Note: the use of Trailing X has been discontinued (November 30, 2016)</p>
050 ‡h and ‡i with X (LC) and Oversize	Ctrl+Alt+F10	<p>For units that use trailing X with 050 00. For units that follow SML practice, this macro is only used if the 050 number gets (LC) in 852. Preferences must be set to copy number from 050. Copies 050 (or 090 in the absence of 050) to 852, adds X at the end of the last cutter, pastes (LC) at the end, adds + and ‡m Oversize. 050 00 only. 050 number must have date at the end, and there should be no ‡x or ‡z subfields in 852. Cursor can be anywhere in the MFHD record.</p> <p>Note: the use of Trailing X has been discontinued (November 30, 2016)</p>
050 ‡h and ‡i with X and (LC)	Ctrl+Alt+F5	<p>For units that use trailing X with 050 00. For units that follow SML practice, this macro is only used if the 050 number gets (LC) in 852. Preferences must be set to copy number from 050. Copies 050 (or 090 in the absence of 050) to 852, adds X at the end of the last cutter, and pastes (LC) at the end. 050 00 only. 050 number must have date at the end, and there should be no ‡x or ‡z subfields in 852. Cursor can be anywhere in the MFHD record.</p> <p>Note: the use of Trailing X has been discontinued (November 30, 2016)</p>
050 ‡h and ‡i with X and Oversize	Ctrl+Alt+F7	<p>For units that use trailing X with 050 00. For units that follow SML practice, this macro is only used if the 050 number does not get (LC) in 852. Preferences must be set to copy number from 050. Copies 050 (or 090 in the absence of 050) to 852, adds X at the end of the last cutter, and + ‡m Oversize at the end of the call number. 050 00 only. 050 number must have date at the end, and there should be no ‡x or ‡z subfields in 852. Cursor can be anywhere in the MFHD record.</p>

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		Note: the use of Trailing X has been discontinued (November 30, 2016)
866	Shift+F6	Inserts new 866 41 †8 0 †a field below existing variable field in MFHD. Position cursor in any cell of preceding field or in the selection column of the field that will precede the new 866 field.
866rev	No Activation	Inserts new 866 41 †8 0 †a field below existing variable field in MFHD. Cursor can be anywhere in the MFHD record.
Bound with Z	No Activation	On 852 inserts bound-with public note †zThe following titles are bound together: at the end of field.
Bound with Z (# other)	No Activation	On 852 inserts bound-with public note †zBound with other titles. at the end of field.
CIE ON MFHD REFERENCE	Ctrl+Shift+F8	On 852, types 8 0 as first and second indicators and inserts staff note †x CIE on MFHD after the call number. Cursor can be anywhere in the MFHD record.
(LC)	Shift+F4	On 852, adds (LC) to the end of the call number. Run after the basic call number has been entered into 852 †h and †i. Cursor can be anywhere in the MFHD record.
(LC) with X	Ctrl+Alt+F4	On 852, adds trailing X to the end of the last cutter and (LC) to the end of the call number. Run after the basic call number has been entered into 852 †h and †i. 050 00 only. 050 number must have date at the end, and there should be no †x or †z subfields in 852. Cursor can be anywhere in the MFHD record.
MFHD Local Yale	No Activation	On 852, adds first indicator 8, second indicator 0, adds blank †h and †i. Run before the call number is entered into 852, since macro will delete everything after †b <location>. Cursor can be anywhere in the MFHD record.
MPM Class Together	No Activation	On 852, inserts public note †z Shelved by the volume number of the main series. Cursor can be anywhere in the MFHD record.

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New Hldg	Ctrl+F6	Creates a new MFHD. Cursor can be anywhere in an activated bibliographic record.
Oversize (LC)	Shift+F5	On 852, adds (LC)+ ‡m Oversize to the end of the call number. Run after the basic call number has been entered into 852 ‡h and ‡i. Cursor can be anywhere in the MFHD record.
Oversize (LC) with X	Ctrl+Alt+F11	For units that use trailing X with LC 050 00. For units that follow SML practice, this macro is only used if the 050 number gets (LC) in 852. 050 number must already be copied to 852; call number must have date at the end. Adds X to the end of the last cutter and + ‡m Oversize to the end of the call number. (Used only for 050 00)  Note: the use of Trailing X has been discontinued (November 30, 2016)
Oversize without (LC)	Ctrl+F5	On 852, adds + ‡m Oversize at the end of the call number. Run after the basic call number has been entered into 852 ‡h and ‡i. Cursor can be anywhere in the MFHD record. NOTE: Only use for LC classification.
Oversize X without (LC)	Ctrl+Alt+F9	For units that use trailing X with LC 050 00. For units that follow SML practice, this macro is only used if the 050 number does not get (LC) in 852. 050 number must already be copied to 852; call number must have date at the end. Adds X to the end of the last cutter and + ‡m Oversize to the end of the call number. (Used only for 050 00)  Note: the use of Trailing X has been discontinued (November 30, 2016)
Trailing X	Ctrl+Alt+F3	For units that use trailing X with LC 050 00. For units that follow SML practice, this macro is only used if the 050 number does not get (LC) in 852. 050 number must already be copied to 852; call number must have date at the end. Adds X to the end of the last cutter. (Used only for 050 00)  Note: the use of Trailing X has been discontinued (November 30, 2016)

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NAVIGATE FOLDER		
Cascade windows	Win+Alt+C	Cascades windows in the Cataloging Module.
Close all records	Ctrl+F1	Closes all open windows in the Cataloging Module.
Get Bib from MFHD or Item Record	F6	From MFHD, opens the Bib record; from Item record, opens the Bib record. Troubleshooting: if the macro aborts at the beginning of the session, maximize the window and run the macro again; macro should be stable for the rest of the session and window can be normalized thereafter.
Get Item from Bib or MFHD	Shift+F7	Retrieves item record(s).
Get MFHD from Bib or Item Record	F5	From Bib or Item record, opens MFHD or MFHD dialog box
Hierarchy	Win+Alt+H	Opens the Hierarchy window in the Cataloging Module.
Next Title (subsequent times)	Shift+Insert	Use after running Shift+F9 to open subsequent windows. Opens the window of the subsequent title from the title list and closes the top window.
Previous Title (subsequent times)	Ctrl+Insert	Use after running Shift+Insert to open previous windows. Opens the window of the previous title from the title list and closes the top window.
Tile Windows	Win+Alt+T	Tiles windows in Cataloging Module.
OTHER FOLDER		
Call number index-lc	Alt+C	Selects Call Number (LC) index in the Orbis OPAC. Works in Internet Explorer & Firefox.
<i>Call number index-lc (enter)</i>	<i>Alt+C</i>	<i>DISABLED. Selects Call Number (LC) index in the Orbis OPAC and enters search. Works in Internet Explorer &amp; Firefox.</i>
<i>Call number index-local</i>	<i>Alt+C</i>	<i>DISABLED. Selects Call Number (Local) index in the Orbis OPAC and enters search. Works in Internet Explorer &amp; Firefox. Use at the beginning of the session or to change indexes after using a different index during the session. Works whether or not text has been entered in Search for: This is an alternate to the default Alt+C macro. To use, the default macro must be disabled, and this one enabled.</i>
Copy Bib ID	No Activation	Copies Bib ID of active bibliographic record. DO NOT USE: Use Ctrl+F2 instead. DO NOT EDIT OR DISABLE: Used by other macro.

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Copy Item ID	No Activation	Copies Item ID of active item record. DO NOT USE: Use Ctrl+F2 instead. DO NOT EDIT OR DISABLE: Used by other macro.
Copy MFHD ID	No Activation	Copies MFHD ID of active holdings record. DO NOT USE: Use Ctrl+F2 instead. DO NOT EDIT OR DISABLE: Used by other macro.
Copy Record ID	Ctrl+F2	Copies ID of active record to Windows clipboard. Works with bibliographic, holdings, and item records in cataloging module only. Run macro then paste ID into any program that allows pasting, e.g. Voyager and Eudora. DO NOT EDIT OR DISABLE: Used by other macro.
<i>Delete Record</i>	<i>Alt+Delete</i>	<i>Deletes active record. Run macro and select Yes to delete. Works with bibliographic, holdings, and item records in cataloging module, but only for those record types that user has permission to delete. DISABLED.</i>
Display Label	Win+Z	Displays Print Label window. Default Voyager configuration displays different information for each type of record. Label configuration may be changed so that Print Label includes only record ID's.
Retrieve Authorities	KeyPad /	If a bibliographic record is open in the Cataloging Module, opens the Retrieve Authorities window.
SAR	Ctrl+S	OCLC CONNEXION ONLY. Opens blank authority record workform and applies constant data.
<b>SEARCH &amp; IMPORT FOLDER</b>		
Barcode	F7	Opens Retrieve Barcode window.
Capture Search by	No Activation	DO NOT EDIT OR DISABLE. Used by other macro.
EAN to ISBN (Cat Module, Acq Module, OCLC Connexion)	Ctrl+F10	Converts EAN barcode number to ISBN format. Works in Cat Module, Acq Module, OCLC Connexion. Position cursor where the ISBN number is to be entered. Run macro to bring up the EAN converter window and scan the barcode. The macro will then change the EAN number to ISBN format and enter it where the cursor is positioned.

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		If there is an Unable to Convert message, try again; sometimes the laser wand or gun misfires.
Go to Search for Box	No Activation	DO NOT EDIT OR DISABLE. Used by other macro.
Headings	Shift+F2	Opens Headings window. (Headings icon on toolbar must be activated).
Import File OCLC and map	Shift+F11	Opens OCLCimp file and remaps character set to OCLC import type.
LCDB Connect	Shift+F10	Opens Search window with remote connection to LCDB only.  Note: obsolete
LCDB Disconnect/ORBIS Connect	F10	Opens Search window in Orbis; disconnects remote connection to LCDB or LCDB/Orbis.  Note: obsolete
Map MARC21 MARC 8 (non-unicode)	No Activation	Sets character set import preferences to non-Unicode file type MARC21 MARC8 (non-unicode). FOR USE ONLY by staff who switch between importing Unicode and non-Unicode records.
Map MARC21 UTF-8	No Activation	Sets character set import preferences to Unicode import file type MARC21 UTF-8. FOR USE ONLY by staff who switch between importing Unicode and non-Unicode records.
Retrieve Record ID (Auth)	Alt+Keypad*	In the Cataloging Module, opens the Retrieve a Record window, defaulted to the retrieval of the Authority Record.
Retrieve Record ID (Bib)	Shift+Keypad*	In the Cataloging Module, opens the Retrieve a Record window, defaulted to the retrieval of the Bibliographic Record.
Retrieve Record ID (Holdings)	Ctrl+Keypad*	In the Cataloging Module, opens the Retrieve a Record window, defaulted to the retrieval of the MFHD Record.
Search	Alt+/ 	Opens Search window in either Orbis or LCDB.
Search [LCDB] local subjects, etc.	No Activation	39 macros corresponding to the search indexes used in Voyager. User can either map the most heavily used searches to a hotkey (each key has a default activation beginning Alt+Shift+<alpha>). Alternatively, user can add to one of the popup menus, or create a separate popup menu, and then run from the popup menu.  Note: obsolete

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Titles	Shift+F3	Opens Titles window. (Titles icon must be activated on the toolbar).
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## Diacritics and Special Characters with Macro Express

These are the keys to which diacritics and special characters are mapped in Voyager according to the WINDOWS ALA KEYBOARD MAP when MACROEXPRESS is turned on. The most frequently used diacritics are on the number pad and are entered at NORMAL or (generally) ALT.\* For alternate characters mapped to the keyboard, note that most sequences begin with either CTRL ALT or CTRL ALT SHIFT, corresponding to normal and shift on the keyboard map. If a key sequence was already claimed by a MACROEXPRESS system macro, the sequence will usually begin with WIN ALT.

For NACO and non-roman script contributors, characters mapped to the number pad are also mapped to the key sequence used in Connexion. In Voyager, the character appears only after you release the keys used in a key sequence. Frequently used diacritics may also be entered through a menu window (F12). You can also evoke a supermenu, a menu listing ALL macros on the \*.mex file in use with the key sequence Ctrl + Alt + Shift + z. To enter any character (or run any macro) listed on a menu, doubleclick on any menu entry (or press the letter or number to the left of the entry); this will also close the menu.

\*You can use the number pad without turning off MACROEXPRESS by holding down the WIN key before pressing a number key on the keypad. If you have both the diacritics.mex and functionkey.mex files loaded in Program Files>Macro Express, Ctrl + Keyboard 5 allows you to switch files. So, if you are using diacritics.mex and want to use the keypad to enter numbers temporarily, press Ctrl + Keyboard 5 to switch to the functionkey.mex file, where diacritics are not mapped to the keyboard.

DIACRITIC/SPECIAL CHARACTER	KEY SEQUENCE	LANGUAGES
Æ Æ upper case æ ae lower case	CTRL ALT SHIFT q CTRL ALT q	Anglo-Saxon, Danish, Icelandic, Norwegian, Thai
acute	up arrow (8) on number pad, or, CTRL ALT o	Afrikaans, Albanian, Arabic, Assamese, Bengali, Catalan, Croatian, Czech, Dutch, French, Gujarati, Hawaiian, Hindi, Hungarian, Icelandic, Kannada, Malayalam, Marathi, Oriya, Persian, Pinyin, Polish, Portuguese, Prakrit, Pushto, Sanskrit, Serbian, Sinhalese, Slovak, Slovene, Spanish, Tagalog, Tamil, Telegu, Tibetan, Vietnamese, Wendic
alif	ALT 2 on number pad, or, CTRL ALT f	Arabic, Assamese, Bengali, Gujarati, Hebrew, Hindi, Indonesian, Korean, Japanese, Malayalam, Marathi, Oriya, Persian, Prakrit, Sinhalese, Tibetan, Turkish, Urdu
alpha, lower case	CTRL ALT a	
angstrom or circle above	ALT 3 on number pad, or, CTRL ALT SHIFT /	Czech, Danish, Finnish, Norwegian, Slovak, Swedish NOTE: for degree sign use superscript zero NOT angstrom
ayn	CTRL 2 on number pad, or, CTRL ALT d	Arabic, Armenian, Chinese, Hebrew, Korean, Persian, Pushto, Sindhi, Thai, Urdu
beta, lower case	CTRL ALT b	
breve	ALT number pad 9, or, CTRL ALT SHIFT . <period>	Bulgarian, Esperanto, Hindi, Korean, Punjabi, Romanian, Russian, Turkish, Ukrainian, Vietnamese, White Russian
British pound	ALT SHIFT z	_
candrabindu	CTRL ALT ;	Assamese, Bengali, Bulgarian, Hindi, Oriya, Prakrit, Sanskrit, Telegu, Tibetan
cedilla	6 on number pad, or, CTRL ALT h	Albanian, Catalan, French, Latvian, Portuguese, Turkish

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circle above see angstrom		
circle below	3 on number pad, or, CTRL ALT /	Assamese, Bengali, Gujarati, Hindi, Kannada, Malayalam, Marathi, Oriya, Prakrit, Sanskrit, Sinhalese, Telegu, Tibetan
circumflex	4 on number pad, or, CTRL ALT SHIFT p	Afrikaans, Albanian, Dutch, Esperanto, French, Gujarati, Hindi, Marathi, Portuguese, Romanian, Sinhalese, Slovene, Tagalog, Telegu, Turkish, Vietnamese
copyright symbol ©	CTRL ALT c	Used in RDA cataloging
D with cross bar Ð upper case ð lower case	WIN ALT w CTRL ALT w	Croatian, Serbian, Vietnamese
dagger	WIN ALT v	
degree	Use superscript zero (LCRI 1.0E)	NOTE: Voyager assigns Shift F1 but does not appear to be activated
dot above	ALT 1 on number pad, or, CTRL ALT SHIFT n	Assamese, Bengali, Gujarati, Hebrew, Hindi, Kannada, Lithuanian, Malayalam, Marathi, Oriya, Polish, Punjabi, Pushto, Russian, Sanskrit, Sindhi, Sinhalese, Tamil, Telegu, tibetan, Turkish, White Russian
dot below	1 on number pad, or, CTRL ALT n	Arabic, Assamese, Bengali, Burmese, Gujarati, Hebrew, Hindi, Kannada, Malayalam, Marathi, Oriya, Persian, Prakrit, Punjabi, Pushto, Sanskrit, Sindhi, Sinhalese, Tamil, Telegu, tibetan, Urdu, Vietnamese
dot at mid-line	CTRL 9 on number pad, or, CTRL ALT SHIFT b	Catalan
double acute	ALT 8 on number pad, or, CTRL ALT SHIFT o	Hungarian
double dot below	* on number pad, or, CTRL ALT m	Hindi, Kannada, Persian, Pushto, Sindhi, Urdu
double tilde first half  double tilde second half	- on number pad, or, CTRL ALT k CTRL - on number pad, or, CTRL ALT L	Tagalog
double underscore	CTRL ALT ' <apostrophe>	–
eth	CTRL ALT v	Anglo-Saxon, Icelandic
foot/feet	USE miagkii znak (LCRI 1.0E)	–
gamma	CTRL ALT SHIFT c	
grave	2 on number pad, or, CTRL ALT `	Afrikaans, Catalan, Dutch, French, Italian, Pinyin, Portuguese, Tagalog, Vietnamese
hacek	ALT 4 on number pad, or, CTRL ALT p	Armenian, Croatian, Czech, Latvian, Lithuanian, Macedonian, Pinyin, Serbian, Sinhalese, Slovak, Slovene, Thai, Wendic
high comma centered	+ on number pad, or, CTRL ALT SHIFT ' <apostrophe>	Latvian
high comma off center	CTRL + (number pad), or, CTRL ALT SHIFT ; <semicolon>	Czech, Macedonian, Navaho, Serbo-Croatian (Roman), Slovak, Slovene, Wendic
hook, left	CTRL ALT SHIFT h	Latvian, Romanian
hook, right	CTRL ALT SHIFT j	Anglo-Saxon, Lithuanian, Polish
hooked o upper case lower case	CTRL ALT SHIFT t CTRL ALT t	Vietnamese
hooked u upper case	CTRL ALT SHIFT i CTRL ALT i	Vietnamese, Thai

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lower case		
Icelandic thorn	CTRL ALT SHIFT u	Anglo-Saxon, Icelandic
Þ upper case	CTRL ALT u	
þ lower case		
inches	USE tzverdii znak (LCRI 1.0E)	_
inverted ¿ [inverted question mark]	WIN ALT q	Added to ALA character set & compatible w/MARC-8 (as well as MARC UTF 8)
inverted ¡ [inverted exclamation point]	WIN ALT e	Added to ALA character set & compatible w/MARC-8 (as well as MARC UTF 8)
(slashed) l see Polish l	_	_
(script) ?	CTRL ALT Shift Period	_
ligature first half	0 on numberpad, or CTRL ALT SHIFT k	Russian, Ukrainian, White Russian
second half	ALT 0 on numberpad, or, CTRL ALT SHIFT L	
macron	9 on number pad, or, CTRL ALT SHIFT , <comma>	Anglo-Saxon, Arabic, Armenian, Assamese, Bengali, Burmese, Greek (Modern), Gujarati, Hindi, Japanese, Kannada, Korean, Latvian, Lithuanian, Malayalam, Marathi, Oriya, Persian, Prakrit, Punjabi, Pushto, Russian, Sanskrit, Sindhi, Sinhalese, Tamil, Telegu, Thai, Tibetan, Urdu
miagkii znak (also: foot/feet; minutes)	CTRL ALT g	Arabic, Bulgarian, Hebrew, Persian, Pushto, Russian, Tibetan, Ukrainian, White Russian
minutes (geo. coordinates)	USE miagkii znak (LCRI 1.0E)	_
musical flat	CTRL ALT x	
Ø (Scandinavian) upper case	CTRL ALT SHIFT quotes <i>Default key sequence not working on Connexion</i>	Danish, Norwegian
ø lower case	CTRL ALT 2	
OE upper case	CTRL ALT SHIFT r	Anglo-Saxon, French, Icelandic, Thai
lower case	CTRL ALT r	
Patent symbol	CTRL ALT SHIFT s	
Plus minus	CTRL ALT SHIFT \	
Polish L upper case [?]	CTRL ALT e	Polish, Wendic
lower case [?]	CTRL ALT shift e	
Pseudo question mark	CTRL ALT SHIFT ` <grave/tilde key under the ESC key>	Vietnamese
script ?	CTRL ALT SHIFT PERIOD	
seconds (geo. coordinates)	USE tzverdii znak (LCRI 1.0E)	
sound recording copyright [?]	WIN ALT p	Used in RDA cataloging
superior dot see dot above		
superscript & subscript numbers	subscript: CTRL ALT <number on regular keyboard>	

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	superscript: CTRL ALT SHIFT <number on keyboard>	
superscript + superscript - superscript ( superscript )	CTRL ALT SHIFT = <= on keyboard> CTRL ALT SHIFT - <minus on keyboard> CTRL ALT SHIFT [ <bracket on keyboard> CTRL ALT SHIFT ] <bracket on keyboard>	
subscript + subscript - subscript ( subscript )	CTRL ALT - <hyphen on keyboard> CTRL ALT SHIFT 6 CTRL ALT [ CTRL ALT ]	
thorn þ upper case þ lower case	CTRL ALT SHIFT u CTL ALT u	Icelandic
tilde	5 on number pad, or, CTRL ALT \	Assamese, Bengali, Estonian, Gujarati, Hindi, Kannada, Malayalam, Marathi, Oriya, Portuguese, Prakrutm Punjabi, Sanskrit, Sindhi, Sinhalese, Spanish, Tamil, Telegu, Tibetan, Vietnamese
Turkish i	CTRL ALT s	Turkish
tverdii znak (also inches; seconds)	CTRL ALT SHIFT g	Bulgarian, Russian
umlaut	7 on number pad, or, CTRL ALT SHIFT m	Afrikaans, Albanian, Catalan, Chinese, Dutch, Estonian, Finnish, French, German, Hungarian, Icelandic, Norwegian, Portuguese, Russian, Sindhi, Spanish, Swedish, Turkish, Ukrainian
underscore	CTRL ALT , <comma>	Assamese, Bengali, Hindi, Kannada, Malayalam, Persian, Prakrit, Punjabi, Pushto, Sanskrit Sindhi, Tamil
upadhmaniya	CTRL ALT . <period>	Sanskrit

## Macro Express 3.5: Checklist for Expert Users

### Macro Express Expert User Checklist

#### CONTENTS

1. Installation -- [2. Master Files](#) -- [3. Editing Master Files & the Voyager Import Path](#). 3.1. Charge to Prep. 3.2. IMPORT.DAT File in Voyager. 3.3. 040 -- [4. Importing Files](#) -- [5. Exporting Files](#) -- [6. "No Activation"](#) -- [7. Popup Menus](#) -- [8. Disable/Enable](#) -- [9. Diacritics](#) -- [10. Macro Express System Key Sequences](#) -- 11. Training -- [12. Search Index Macros](#) -- [13. Checklist for Creating New Macros](#) -- [14. Aborting](#) -- 15. Help

#### 1. Installation.

The Macro Express software is usually pre-loaded and pre-registered on technical services workstations configured by SML WTS (Workstation & Technology Services). Significant updates to the Macro Express files or to the program itself are not done to individual workstations, but are pushed out by WTS to all technical services workstations.

In the standard WTS configuration, Macro Express will be included in the Start Up folder. Macro Express will start automatically when logging in to the staff member's account. Under the default configuration, the splash screen, text window, and program window are suppressed at start up, so it will not be obvious that the program is running in the background. To edit MacroExpress, open the Hidden Icons tray and click on the MacroExpress icon to

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display the text window. *Although there may be a MacroExpress icon on the Start Menu, clicking on it will not open the program for editing.*

**Troubleshooting.** If Macro Express is not in the Start Up folder, the expert user will need to set the Preferences or instruct staff in how to do so. *Options-->Preferences-->Startup <last item in the list-->Check "Run on Windows Startup"* (all other options should be unchecked).

**Troubleshooting.** If Macro Express has not been pre-registered at the time of installation, it is only usable for a trial period of about a month. If the program stops working, check to see whether it has been registered. TIP: To register manually, click on Help and select License Information; enter Yale University Library under User Name; obtain the registration number from the WTS liaison or copy the number from a registered program.

Ensure that when the Macro Express window is open, Open File opens in C:\Program Files\Staff (x86)\MacroExpress 3. If a master file does not display in the staff member's MacroExpress window, click on Open File and double-click on the appropriate master file to enable. Who currently lack Macro Express: staff member will need to decide which master file to enable. See 2. below for details. Expert user may need to show or help the staff member to enable the appropriate file. To enable a macro file:

- Click on the Folder icon on the Toolbar (or use File-->Open Macro File
- Verify that the "Look in" is Macro Express3
- Doubleclick on **MASTER<version #>D.mex** or **MASTER<version #>N.mex** (or click once and click the Open button). Whichever file is "Open" becomes the enabled file; only macros in the Open file can be used.

---

## 2. MASTER FILES.

In the Macro Express 3 folder there will be at least 2 master files: **MASTER<version #>D.mex** and **MASTER<version #>N.mex**. Keep both files. Be sure the most current version is being used, but do not automatically delete the earlier version, if there, in case there are individually customized macro that need to be transferred to the current versions. To avoid confusion, be sure that these master files are kept in Program Files-->Macro Express 3. The ...**D.mex** file has all the function key macros included on ...**N.mex** file plus the full set of diacritics.

If a new staff member takes over a workstation, WTS generally re-images the workstation and all of the programs revert to their default configurations. Make sure the re-imaged version has the current Macro Express files.

**NUMBER PAD/MASTER File Toggle.** On the ...**D.mex** file, heavily used diacritics are mapped to the number pad roughly corresponding to the old NOTIS keyboard, as well as to the regular keyboard. If the ...**D.mex** file is being used, you can turn off the diacritics on the number pad by holding down the WIN key. Alternatively, you can switch to the ...**N.mex** file with the key sequence *Ctrl+Number pad 5*, since ...**N.mex** files do not have diacritics mapped to the number pad. Toggle back to the ...**D.mex** file with the same *Ctrl+Number Pad 5*.

---

## 3. Editing the Master Files in Macro Express and the Import Path in Voyager/Cataloging

**3.1. Charge to Prep (F7)** is provided for use in the Circulation module that will enter the most heavily used patron code (for Cataloging, this will be a specific Prep. Team patron code assigned to members of a team). This macro must be edited to include the appropriate patron code digits for the particular team. To edit,

3.1a. Find the macro in Macro Express edit. Click on the Nickname column to sort by name (Charge to Prep); or click on Activation to sort by key (F7).

3.1b. When the macro is found, double click on its listing. Under Macro Script in the right window, double click on Text Type: prptm\*\*\*\*.

3.1c. Text type Keystrokes window will open. Replace the text prptm\*\*\*\* with the appropriate patron code for the unit you need to charge to. Click OK.

3.1d. Click on File Menu and click on Save.

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3.1e. Test the macro in the Circulation module.

3.1f. Cataloging units may want to clone the macro and assign to different function keys for other heavily used patron code charges.

**3.2. IMPORT.DAT FILE.** Expert user needs to make sure there is an import.dat file in OCLCIMP. Make sure the oclc export path on OCLC Connexion is: c:\voyager\catalog\oclcimp\import.dat <NOT export.dat> Explanation: the macros to open the import files will be looking for the import.dat file. Note that the updated OCLC import file macros also map to the appropriate font before opening the import file.

**3.3. 040 (Ctrl + F12) and Delimiter 040 (Shift + F12).** If the cataloging unit does not use MARC21 code CtY, their expert user will need to add the appropriate code to the macro in both the ...**D.mex** and ...**N.mex** files as follows:

3.3a. Open the Macro Express window.

3.3b. Under the Nickname column find the macro listing for **040** or **040 Delimiter \$d CtY** and doubleclick on the listing.

3.3c. Two subwindows, Commands and Macro Script will open.

3.3d. Under Macro Script, find Text Type line with CtY and doubleclick on it.

3.3e. Keystrokes window will open. Change the text to the appropriate MARC21 code.

3.3f. Click the OK button at the bottom of the Keystrokes window, which will close.

3.3g. Click on the Save icon on the Macro Express toolbar (or File-->Save)

3.3h. Click on the Macro Explorer icon under the Actions column to return to the Macro list.

3.3i. Minimize the Macro Express window.

3.3j. Test the macro in the Cataloging Module.

---

## 4. Importing Files.

Sometimes a particular macro is created and is not ready to be included in a WTS mass push-out. Macro files can be transferred via thumb drive or as attachments. Only files (\*.mex) can be sent as attachments; macros themselves cannot be sent as attachments. (Double clicking on an attachment icon in an e-mail message will do nothing)

To import a macro from an e-mail attachment file:

4.1. In your e-mail, select the attached file's icon and open the selection menu to "Save As." Save the file to the Macro Express 3 folder.

4.2. You now need to import the file into the staff member's working master file (your target file). The target file should be open in Macro Express.

4.3. In the Macro Express editor, click on the Import Macros button on the toolbar; the Import Macro window will open. Find the Open File button at the foot of the window.

4.4. Click on Open File to open the Import Macro window, which should open in the Macro Express 3 folder.

4.5. Find the appropriate \*.mex file and double click on it. The Import Macros window will open with the \*.mex file listed in the formerly blank window.

4.6. Select the macro with your mouse. This will activate the Import button.

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4.7. Click on the Import button. You will generally get a successful import message.

4.8. If an imported macro has the same activation (hot key) as a macro already in your target file, you will get a notification message. Click OK. The imported macro will import without an activation. You can either assign a different activation, or disable the macro with the conflicting activation and then assign that activation to your imported macro. (You would do the latter if the imported macro is a replacement for a previously existing macro.)

---

**5. Exporting Files.** If you create new macros, the export function allows you to create a file of macros of manageable size suitable for sending as an attachment. (Don't send the master files as attachments!)

5.1. Open the Macro Express file containing the macros to be exported.

5.2. Click on the Export Macro icon on the toolbar (or use File menu-->Export-->Export Macros). The Export Macros window will open.

5.3. With the mouse, select all macros to be exported, then click on the Save File button. The Export Macros To window will open (generally in the Macro Express folder; you probably want to save the file in this folder)

5.4. Assign a name to the file in File Name slot and click the Save button. (The file extension.mex should be provided automatically)

---

**6. "No Activation."** Some No Activation macros have very specific functions and staff may not want to utilize limited key assignments on them. Other No Activation macros are used in macro strings where a hotkey activation is not necessary. Most of the macros that change the search index are not enabled, but many of them have key sequences pre-assigned. If searching in various indexes is important, the appropriate hotkeys should be enabled as described under 12.

If the key is to be activated, the range Ctrl+Shift, Alt+Shift, or Win+Crl should be used (these ranges have been set aside for custom uses). To activate, i.e. assign to a hotkey:

6.1. Open the macro file, and with the mouse select and double-click on the macro to be activated. Usually the Script tab windows (Commands/Macro Script) will open. If so, change the display by clicking on the Properties tab. The Properties windows will open (General/Activation)

6.2. In the Activation window (right), click in the Hot Key box. This will enable the Set Hot Key button.

6.3. Click on the Set Hot Key button. The Set HotKey Activation window will open with a default hotkey value selected. Click OK unless a different hotkey is preferred.

6.4. Click on the Macro Explorer icon at the top of the far left column. You will be prompted to save the change. Click OK. (Or, click on the save icon on the toolbar)

Alternatively, you can add a No Activation macro to an enabled Popup Menu without assigning a hotkey to the macro.

---

**7. PopUp Menus.** In the standard configuration, popup menus should be assigned to the F12 key. To create a popup menu you must already have a set of macros in your \*.mex file. With the appropriate \*.mex file open,

7.1. Click on Add a macro button (or menu Macros-->Add a macro). Add a Macro window will open.

7.2. Click on the Popup Menu radio button.

7.3. Assign a hot key, then click on the now activated Build a Menu button.

7.4. Available macros will appear in the upper window, and you click on the Add to add to your menu. Be sure to click on the Properties tab to assign a Nickname and the Scope tab to restrict to Catalog.exe.

7.5. Macros run from the Popup menu do not need to be assigned to a hotkey (i.e., they will run even when No Activation has been selected)

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7.6. You can edit the Popup pad, adding new macros with the insert arrows, taking off macros you find you don't need, and you can move the macros up and down with the up/down arrows on the right. Or, you can edit one of the preset popup menus that come with the master files, selecting the diacritics you use the most (or the least) or the function keys you use the most (or the least). The Popup menu is sometimes most useful for infrequently used macros since the key sequence doesn't need to be memorized or looked up.

7.7. TIP: the nickname begins with *Popup menu* if you need to find the menu in the macro list and you haven't assigned a category to it.

7.8. To run a macro from a Popup pad:

- a. Position the cursor where the macro should begin running
- b. Press the Popup pad hotkey to activate the menu display (do not activate the Voyager window before performing 8.7c following or the macro will not run)
- c. Either double-click on the macro nickname in the menu display or, type the number or letter to the left of the nickname. The menu display will close automatically and the macro will run.

7.9. TIP: If you import a Popup menu from the master file, select and import all of the macros to be used in the Popup menu at the same time.

The preset popup menus are disabled. To enable the one or the other, see 9.

---

**8. Disable/Enable.** Macros disabled in the master files are considered to be generally useful enough to be assigned a standard hotkey, but require training in their use, so they are distributed in the disabled status so untrained staff will not run the macro accidentally. To enable a disabled macro:

- 8.1. Open the macro file, and with the mouse select and right click on the macro to be enabled. The menu options will open.
- 8.2. Click on Enable Macro on the menu.
- 8.3. Click on the Macro Explorer icon at the top of the far left column. You will be prompted to save the change. Click OK. (Or, click on the save icon on the toolbar)

---

## 9. Diacritics.

9.1. there is a table listing all the Macro Express key mappings for [diacritics and special characters](#) [3].

9.2. The number pad has been mapped to the old NOTIS diacritics at Normal. The old NOTIS number pad diacritics at Shift are mapped to ALT + <keypad number>. There are some NOTIS diacritics on the keypad that were mapped to the CTRL + <keypad number>, and the mapping follows NOTIS in that case.

9.3. The same diacritics are also listed on a popup menu evoked by pressing F12. (If the menu has been enabled) If a diacritic listed on the popup menu is doubleclicked it will be entered in Voyager wherever the cursor has been placed. (A diacritic can also be entered by pressing the key for the number or letter to the left of the listing or by selecting the listing and pressing Enter.)

9.4. To turn off the diacritic mapping on the number pad (i.e. to enter numbers), press CTRL + Number pad 5. This macro will toggle Macro Express from the ...**D.mex** file to the ...**N.mex** file. To enter diacritics again, toggle back by pressing CTRL + Number pad 5 again. Alternatively, if the ...**D.mex** file is open, hold down the WIN key and press the number pad numbers. (The latter is not a toggle & it is unclear why it works.)

9.5. Staff should be warned that pressing the Voyager CTRL+d sequence (which turns on the alternate character set) will cancel the Macro Express diacritics macros (the diacritics macros include Ctrl + d, so pressing CTRL + d before running the macro prevents the software from evoking the alternate character).

9.6. To enter diacritics when ...**D.mex** is on, NUM LOC must be on.

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9.7. Diacritics mapped to the keyboard follow the Windows ALA Keyboard Map. Diacritics at “normal” position are generally evoked with Ctrl + Alt; diacritics at “shift” position are generally evoked with Ctrl+Alt+Shift. (There are some exceptions that occur when the key sequence conflicts with a Windows or Macro Express sequence)

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### 10. Important Macro Express System Key Sequences:

10.1. Ctrl+Alt+Shift+z Opens the list of macros that apply to the topmost window. If you click on any of the macros displayed on the list, it will run. To close the list, use the standard Windows command Alt+F4.

10.2. Ctrl+Alt+Shift+v. Terminates Macro Express. To re-start:

Programs-->Macro Express-->Macro Express 3

10.3. Ctrl+Alt+Shift+w Opens Macro Express Editor

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### 11. Training (primarily for staff new to Macro Express):

11.1. Practice use of macros in torbis rather than prodorbis

11.2. Practice in torbis: when you depress a key sequence to run a macro, you must take your fingers off the keys for the macro to execute.

11.3. Practice in torbis: The Erase-End-of-Field (EOF) macro has been mapped to Shift + Delete in the current macro file configuration. On NOTIS, EOF was on the Page Down key. The Page Down function has been retained in order to facilitate navigation in lengthy menus, something that was not a feature in NOTIS.

11.4. Practice in torbis: Text macros (all diacritics, most MFHD macros) depend on the correct placement of the cursor in order to run properly (and not replace the wrong text!).

11.5. Walk through each of the macros listed on the standard function keys table (note that this table lists macros that include all the function keys as well as important macros that are NOT mapped to the function keys and which are not listed on the template). URL for the table listing standard macros:

<https://collaborate.library.yale.edu/cpdc/PDF%20files/Standard%20Macro%20...> [4] [4]

11.6. There is a template for the function keys at:

<https://collaborate.library.yale.edu/cpdc/PDF%20files/voyager%20catalogi...> [2]

**NOTE: The template must be printed on legal size paper.**

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### 12. Search Index Macros:

38 new macros have been created to effect rapid selection of the desired search index.

12.1. All macros are distributed as No Activation. However, each macro has a default hotkey that will be prompted when the macro is activated. Individual users are free to map a given macro to another hotkey, especially if it is expected that the macro will be heavily used. Be sure to consult the complete keyboard mapping table to make sure that the hotkey selected for re-map is available (i.e., don't re-map to a Macro Express system hotkey, a Window key sequence you also need, or the hotkey of another macro you expect to use).

12.2. The macros are written to run in the Cataloging, Circulation, or Acquisitions modules. When switching between modules you can run the macros in all three modules in sequence, except that the Staff Headings searches are not available in the Circulation or Acquisitions modules. CAUTION: If you run multiple instances of any single module, e.g. two instances of the Cataloging module, for any given session, the first instance in which any Search macro is run will be the only instance in which the Search macros will run. So, if a Search macro is run in the second instance of the Cataloging module, the Search macros will then only work in that second instance and will malfunction if run in the first instance of the Cataloging module. To reset the Search macros close all

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Voyager modules and terminate MacroExpress, then restart the Voyager modules and MacroExpress.

12.3. The macros have been created for indexes in PRODORBIS (production Orbis). CAUTION: some indexes in PRODORBIS are not in Torbis (the test & training database). If you are in Torbis and try to run a macro for an index not active in Torbis, the macro will search for the index indefinitely, or until you abort it. Until the macro is aborted, you cannot run any other macros.

Some Search macros work only in Orbis and other Search macros work only in LCDB. They simply don't work, so they don't need to be aborted if run in an inappropriate database

12.4. Most of the Search macros run with a delay of 175 microseconds following the **Text type** command. The delay will vary depending on the workstation, and in some cases no delay is necessary. If the Search macro retrieves the wrong index, the usual solution is to increase the delay to around 300 microseconds. To change the Delay speed: double-click on Delay; a Set Delay window will open. Change the delay from 175 to 300 and click OK; then save the updated version of the macro. (Don't forget to save the macro before you test it!) Expert users can also experiment to see if the macro will run if the delay is disabled. To disable: select the Delay line and click on the ! in the left gray column and save; a red line will cross out the Delay command. To re-enable: select the Delay line and click on the ! in the left gray column and save.

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## 13. Checklist for Creating New Macros:

13.1. The program under which you will run your macro should be running.

13.2. Make sure your target file is up. Click on New Macro button on the toolbar or from menu, Macros-->Add Macro. Add Macro window will open.

13.3. From the Add Macro window, select the hot-key to be used to activate the macro. Assign your hot-key from Alt + Shift, Ctrl + Shift, or Win + Ctrl only. These ranges have been designated for individuals and specific teams. Your team may want to reserve one of these ranges for macros used by all or most members of the team. ALTERNATIVELY: select No Activation if you intend to map the macro to an existing Popup menu. Now click on the Scripting Editor button; the Scripting Editor window will open (with 2 subwindows Commands and Macro Script); note the tabs above the Command Subwindow: Script, Properties, Scope, Security, Notes.

13.4. Before you begin writing the script, click on the Properties tab and assign a Nickname; click on the Scope Tab and click on the Program Specific radio button, then click Select. Select Programs window will open. IMPORTANT: You must select a specific program or programs under which the macro is allowed to run. If you do not specify a program, the macro will run globally (the default selection) and interfere with non-Voyager programs like Eudora or even general Windows functions.

13.5. From the Select programs subwindow, select the program under which the macro will run. For the Voyager cataloging module, generally this will be CATALOG.EXE. Clicking on the program name will select it to the Selected Programs subwindow. Click the Add button. CATALOG.EXE will now appear under Select from a list of installed Programs; there will be a box Run if on Top checked below. Now click the OK button. Now click on the Script Tab to go back to the Scripting Editor.

13.6. To create a simple text macro, click on A Text under Commands, then double click on Text Type. Text Type direct editor window will open.

13.7. To enter a function in the text type string, click on the function name in the menu. It will appear in brackets. Key in unbracketed text for the macro to type in. Click OK to save the string. <to save the macro itself, you need to click on the save icon on the toolbar after clicking OK>.

13.8. Test macro. Sometimes it helps to save only a short string of commands and test to make sure the short string works before adding more commands. In Voyager, sometimes you need to include F8 to allow editing within a cell.

13.9. In some cases, you need to insert a delay of ca. 10 microseconds between command strings. Click on Timing under Commands, then double click on Delay. Be sure to select the radio button for microseconds and enter the number of microseconds. (The default is seconds so you must re-select)

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13.10. When you add a command to a string, you may need to move it up or down in the sequence. Use the Up/Down arrows on the side of the window to do this.

13.11. Housekeeping. Keep a backup file of custom macros (macros assigned in the ranges reserved for customization). It should be relatively easy to obtain a copy of the standard macros, but no one will ordinarily have a copy of your custom macros.

13.12. Macros based on recording of mouse positions are not readily transportable and in some cases may not work if you re-size your window. Use the Script Editor to record key strokes when possible.

13.13. The same function key or key sequence can run different macros in different modules. (If the scope is set properly)

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## 14. Aborting.

Multiple macros cannot run concurrently in Macro Express. Most macros close after running through a prescribed and limited sequence of commands. However, some macros are set to close only after a prescribed number of sequences have run, or after a defined period of time,\* or some other condition occurs. If that condition never occurs (as with some Search macros in Torbis), the macro will run indefinitely. A macro is running when a running figure is in the Start tray, usually on the bottom left corner of the Windows display. The running figure will replace the Macro Express "crossed M" as long as the macro is running. If a macro that is usually enabled does not run, check the Start tray; another macro may be running.

To abort the macro, right-click on the running figure. You will be prompted to abort the macro; click OK.

Alternatively: Abort the macro by using the key sequence Scroll Lock + Break (usually above the number pad). This might be necessary if the macro includes mouse movements, which could stop the user from being able to right click on the running icon.

\*An example is the Circulation Override macro, which is set to run until 100 charges have been made; if fewer than 100 charges are made in the session, the macro will need to be aborted. However, if it is not aborted, it is set to time out after 2 minutes. If staff use the Override macro, expert users should be sure they know how to abort the macro.

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## 15. HELP. Questions, corrections:

Acquisitions: Eric Friede. Cataloging: Todd Fell.

Previously revised: 12/14/04

**Effective Date:** February 10, 2014

## Macro Express: Keyboard Map

Last Revision 1/19/05						
KEY	Used by Windows	Used by Voyager	ME Acquisitions	ME Cataloging	ME Circulation	Other
A	XX	XX	XX	XX	XX	
B	XX	XX	XX	XX	XX	
C	XX	XX	XX	XX	XX	
D	XX	XX	XX	XX	XX	
E	XX	XX	XX	XX	XX	
F	XX	XX	XX	XX	XX	

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G	XX	XX	XX	XX	XX	
H	XX	XX	XX	XX	XX	
I	XX	XX	XX	XX	XX	
J	XX	XX	XX	XX	XX	
K	XX	XX	XX	XX	XX	
L	XX	XX	XX	XX	XX	
M	XX	XX	XX	XX	XX	
N	XX	XX	XX	XX	XX	
O	XX	XX	XX	XX	XX	
P	XX	XX	XX	XX	XX	
Q	XX	XX	XX	XX	XX	
R	XX	XX	XX	XX	XX	
S	XX	XX	XX	XX	XX	
T	XX	XX	XX	XX	XX	
U	XX	XX	XX	XX	XX	
V	XX	XX	XX	XX	XX	
W	XX	XX	XX	XX	XX	
X	XX	XX	XX	XX	XX	
Y	XX	XX	XX	XX	XX	
Z	XX	XX	XX	XX	XX	
[	XX	XX	XX	XX	XX	
]	XX	XX	XX	XX	XX	
\	XX	XX	XX	XX	XX	
Tab	XX	XX	XX	XX	XX	
;	XX	XX	XX	XX	XX	
"	XX	XX	XX	XX	XX	
, <	XX	XX	XX	XX	XX	
. >	XX	XX	XX	XX	XX	
?	XX	XX	XX	XX	XX	
1	XX	XX	XX	XX	XX	
2	XX	XX	XX	XX	XX	
3	XX	XX	XX	XX	XX	
4	XX	XX	XX	XX	XX	
5	XX	XX	XX	XX	XX	
6	XX	XX	XX	XX	XX	
7	XX	XX	XX	XX	XX	
8	XX	XX	XX	XX	XX	
9	XX	XX	XX	XX	XX	
0	XX	XX	XX	XX	XX	
` (accent)						
minus	XX	XX	XX	XX	XX	
equal	XX	XX	XX	XX	XX	
Esc	Cancel current task	XX	XX	XX	XX	
F1		Help (context-specific)			Override	Help (Connexion)
F2	Rename sel item	Valid Values	XX	XX	XX	

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F3	Search for a file or folder	Insert Field Before	XX	XX	XX		
F4		Insert Field After	XX	XX	XX		
F5	Refresh active window			Open MFHD or MFHD dialog box			
F6	Cycle through screen elements in a window or on desktop			From MFHD, opens Bib Title Tab			
F7				Retrieve barcode window	Enter selected patron barcode		
F8		Edit a Field	XX	XX	XX		
F9		Insert Delimiter	XX	XX	XX		
F10	Activate menu bar in active program			XX			
F11		Unselect text					
F12				popup window	popup window		
Insert							
Home							
Page Up							
Delete	Delete	XX	XX	XX	XX		
End				End of Field?			
Page Down							
Left Arrow	Open next menu to the left or open a submenu	XX	XX	XX	XX		
Right Arrow	Open next menu to the right or open a submenu	XX	XX	XX	XX		
Up Arrow							
Down Arrow							
K0				Ligature left (first half)			
K.							
K1				Dot below			
K2				Grave			
K3				Circle below			
K4				Circumflex			
K5				Tilde			
K6				Cedilla			

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K7				Umlaut			
K8				Acute			
K9				Macron			
K/							
K*				Double dot below			
K-				Double tilde first half			
K+				High comma centered			

## Macro Express Troubleshooting Archive

(Jan. 2007)

1. **866**. This macro is used in the MFHD to add an 866 field with the correct indicators. If you place the cursor in the preceding field, hold down the SHIFT key and press F6, the macro should add an empty 866 field:

8	0	1	‡b sml ‡h TN210 C65
5			‡i A14+ ‡m Oversize
2			
8	4	1	‡8 0 ‡a v.42(1947)-v.8
6			3(1988),
6			
8	4	1	‡8 0 ‡a
6			
6			

On some workstations, the macro is entering the 866 like this:

8	0	1	‡b sml ‡h TN210 C65
5			‡i A14+ ‡m Oversize
2			
8	4	1	‡8 0 ‡a v.42(1947)-v.8
6			3(1988),
6			
8	4	1	‡ ‡8 0a
6			
6			

To correct, edit the last Text Type line of the macro by deleting one each of <ARROW LEFT> and <ARROW RIGHT>.

On the distributed macro:

1<TAB><CONTROL><ARROW LEFT><ARROW LEFT><F9>80<CONTROL><ARROW RIGHT><ARROW RIGHT>

Edit the Text Type line to:

1<TAB><CONTROL><ARROW LEFT><F9>80<CONTROL><ARROW RIGHT>

TIP: You might want to keep the old Text Type line in reserve in case you change workstations.

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**2. Charge to Prep.** This macro is used primarily in SML Tech Services where items charged to the cataloging unit need to be charged to the Preparations team for purposes of status tracking. In the Circulation module, pressing F7 opens the Charge window, enters the barcode number for the Prep Team, and places the cursor in Item Barcode prompt slot. The macro as distributed works if entering the Prep Team Barcode evokes a Patron Blocked window. If it does not, the macro aborts. If your macro is aborting, disable the Wait for Window Title "Patron blocked" and disable all of the lines following. Save changes.

(To enable/disable, select the line in the Macro Script with your mouse and click on the exclamation point icon in the column to the left of the Macro Script window)

Macro script should now look like this:



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3. Override macro (F1) [affected XP workstations]. If, after pressing F1 and scanning the first barcode, a drop down menu appears and the macro stops running, the problem can be fixed by following Text type: <ALT> o with two Enters.

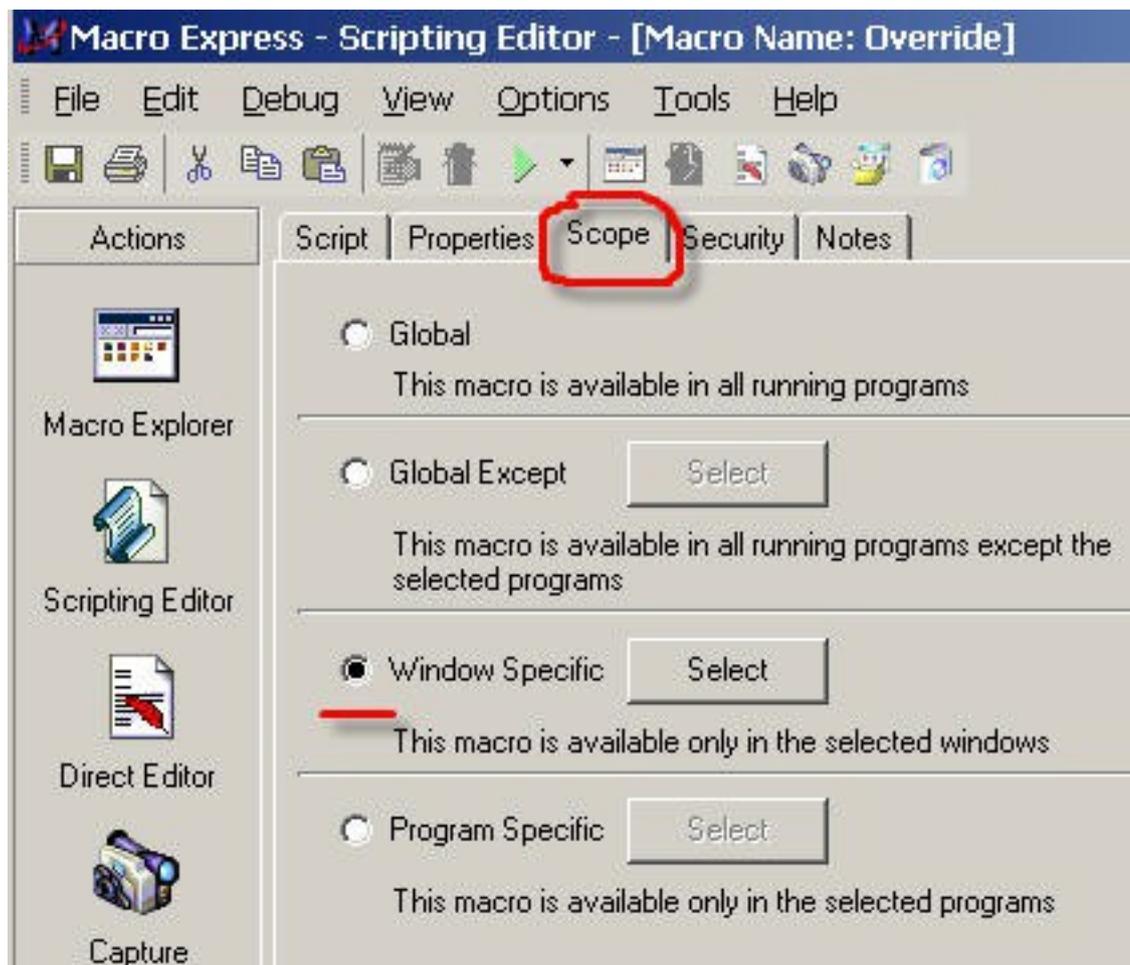
---

4. Circulation macros [affected **Windows 2000** workstations].

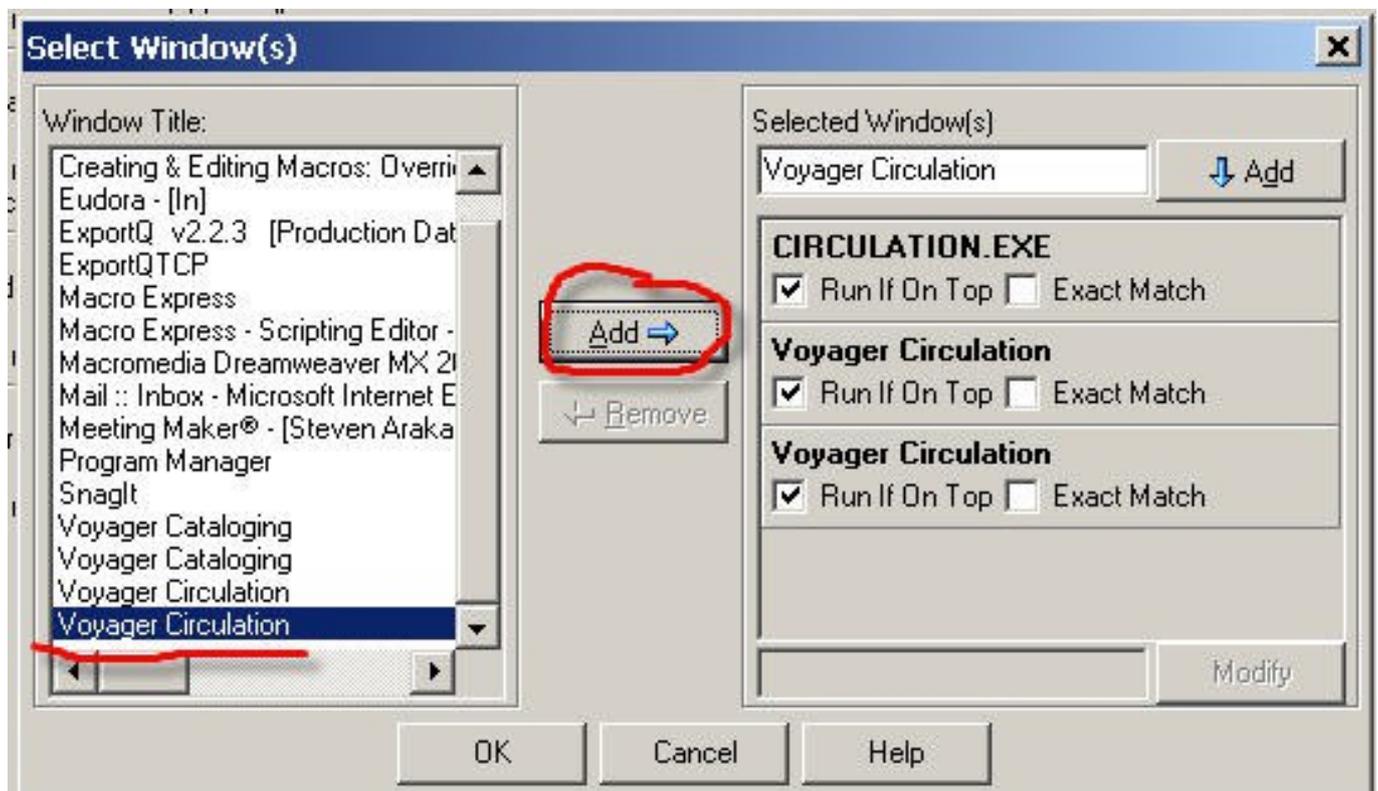
- Open the macro listing from the Macro Explorer window and click on the Scope tab. The default Scope is Program Specific.
- Click on the radio button for Window Specific and click on the Select button.

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c. Select all Window titles (left box) named Voyager Circulation and click on the ADD button.

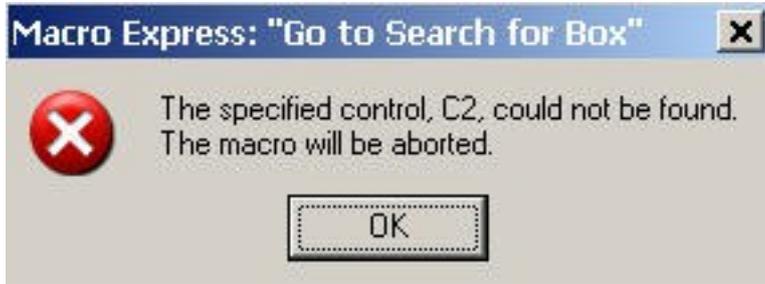


d. Click OK, then (important!) save changes. (Click on the save icon, or click on the File menu and then click save, or click on the Macro Explorer icon in the Actions column and click Yes when prompted to save the changes.)

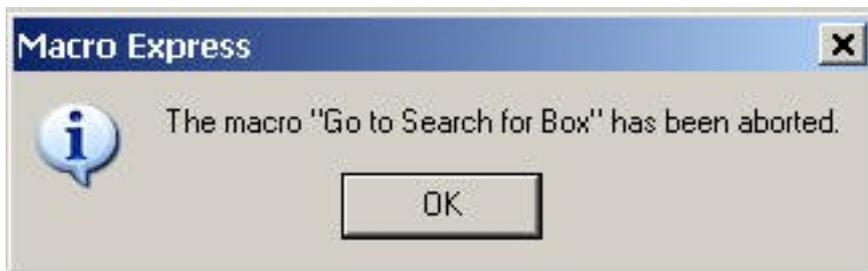
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5. Open Search Window. (Alt /). On some workstations, running the Open Search Window macro opens a "Go to Search for Box" window along with the Search window.



The macro continues to run until the "Go to" window is closed. When the "Go to" window is closed, an additional window prompting you to acknowledge the abort will also require a click.

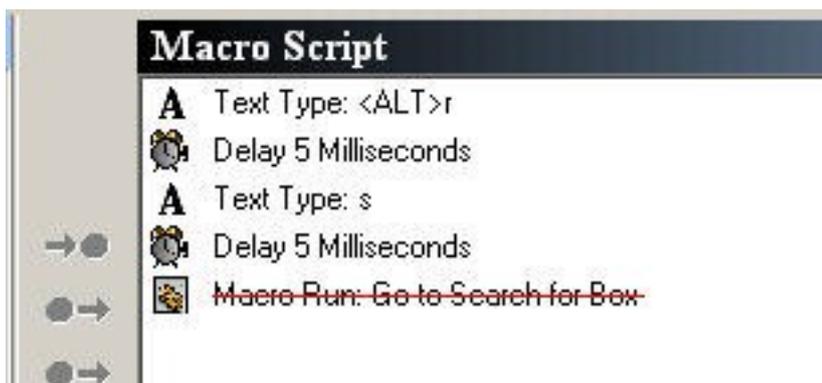


Often the "Go to" window will appear behind the Search window, and the only indication that the macro is running will be the running figure icon in the start tray that replaces the Macro Express icon when a macro is running.



Until the macro is aborted (point cursor on the icon and right click), no other macro will run.

To fix, line out the last line of the Macro Script. (See 4.2 for lining out) Be sure to save the change!



Effective Date: February 12, 2014

## Voyager MacroExpress Keypad Map

NUM LOCK must be on	/	*=double dot below: x?	-=double tilde (first half):?!
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			Ctrl+=d.t. (2nd half: i?
7=umlaut: u?	8=acute: i? Alt+8=double acute: a?	9=macron: o? Ctrl+9=dot midline: ·a Alt+9=breve: o?	+=high comma centered: o?  Ctrl (and)+= h.c. off center: ?a
4=circumflex: a? Alt+4=hacek: a?	5=Tilde: o?	6=Cedilla: c?	
1=dot below: h? Alt+1=dot above: h?	2=grave a? Alt+2=alif: ?A Ctrl+2= ayn: ?A	3= circle below: u? Alt+3=circle above: a?	Enter
0=ligature Left: ?a Alt+0=ligature Right: a?		DEL	

Popup Menu: F12 (must be enabled manually)

5/3/05/rev. 9/23/05

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Source URL: <https://web.library.yale.edu/cataloging/macroexpress/documentation>

## Links

- [1] <https://collaborate.library.yale.edu/cpdc/PDF%20files/Macro%20list.xls> [2] <https://collaborate.library.yale.edu/cpdc/PDF%20files/voyager%20cataloging%20function%20key%20template.doc>
- [3] <https://web.library.yale.edu/cataloging/macroexpress/documentation/diacritics-special-characters> [4] <https://collaborate.library.yale.edu/cpdc/PDF%20files/Standard%20Macro%20Express%20Function%20Keys.doc>