

# Macro Express 3.5: Checklist for Expert Users

## Macro Express Expert User Checklist

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### 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 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 FilesStaff (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.

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### 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.

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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*.

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### 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.

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.

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3.3.j. Test the macro in the Cataloging Module.

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### 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.

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.)

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**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)

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**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.

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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.

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**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)

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.

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**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.

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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)

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### 9. Diacritics.

9.1. there is a table listing all the Macro Express key mappings for [diacritics and special characters](#) [1].

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.

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:

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

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

<https://collaborate.library.yale.edu/cpdc/PDF%20files/voyager%20catalogi...> [3]

**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 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.

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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)

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

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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

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**Source URL:** <https://web.library.yale.edu/cataloging/macroexpress/expert-users-tips>

### Links

[1] <https://web.library.yale.edu/cataloging/macroexpress/documentation/diacritics-special-characters> [2]

<https://collaborate.library.yale.edu/cpdc/PDF%20files/Standard%20Macro%20Express%20Function%20Keys.doc>

[3] <https://collaborate.library.yale.edu/cpdc/PDF%20files/voyager%20cataloging%20function%20key%20template.doc>