

Creating Templates in Voyager

Voyager Cataloging Templates Workshop

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Functionality of Voyager Cataloging Templates

- A Voyager cataloging template allows you to use a MARC record with constant data that is pre-defined in order to create new records easily.

Voyager Supplied Templates

- Before you can create a record, there must be at least one template in the template directory in the Voyager directory.
- Voyager provides you with three templates:

bib.tem

auth.tem

hold.tem

- These templates should not be deleted.

Yale Cataloging Added Templates

- Yale Cataloging Implementation Team has created and distributed a set of 7 templates for bib records.
- The 7 templates are for different formats.
- All 7 templates are in the folder named **C:\Voyager\Catalog\Template\ preliminary record templates**.

How to create new templates

Creating new templates

1. Click **File** on the menu bar.
 2. Put cursor on **Template**. At the right side after the right arrow, you will see two sub-options: **New...** and **Edit....**
 3. Click **New...** to create a template from scratch.
 4. A small window titled **Create a New Record** will pop up. Select **Bibliographic** as the record type, and click **OK**
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1. You will get a very brief bib MARC record, with only a 245 field. Edit the record to make it a template for your purpose.
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1. After you have finished editing, click **File** on the menu bar.
2. Click **Save As...**
3. The default directory of your template file should be in *C:\Voyager\Catalog\Template*. If not, find the directory.

1. To save your template directly in this folder, give your template a name and click **Save**.
2. If you need to create a few templates, it is better that you create a folder in **Template** and save all your templates in the folder. To do this,
 - in the **Select Bibliographic Template** dialogue box, click the yellow folder icon with star on the bar under the title bar of the dialogue box.
 - Type in the folder name and click **Open**.
 - Give your template a name and click **Save**

Editing existing templates

1. Click **File** on the menu bar.
2. Put cursor on **Template**. At the right side after the right arrow, you will see two sub-options: **New...** and **Edit....**
3. Click **Edit...** to edit an exiting template.
4. The dialogue box **Open Template File** will pop up.

1. Select your template file and click **Open**.
2. Edit your template file.
3. Click **Save** icon on the tool bar of cataloging module.
4. You will get a pop up message titled **Template updated**. Click **OK**.

How to use templates?

Selecting a template, editing, and saving into Orbis

1. Click **Open** icon on the tool bar of cataloging module.
2. A dialogue window titled **Select Work File** will pop up.
3. Change the Files of type to **All (*.*)**.
4. Select the appropriate directory to find your template file.

1. Click your template file. Click **Open**.
2. A small window titled **Select work record** will pop up. Click **OK** to open the template record.
3. Edit the record to make it a bib record.
4. Under File on the menu bar, click **Save As** and save to a work file.
5. Click **Save to DB** icon on the tool bar of the cataloging module.

Setting a template as the default (1)

1. Click **Options** on the menu bar.
2. Select **Preferences**.
3. The window **Session Defaults and Preferences** will pop up.
4. Click the tab **Folders/Files**.
5. Under **Templates**, click the ... box at the end of **Bib** directory.
6. A window **Select Bibliographic Template** will pop up.

Setting a template as the default (2)

1. Select the appropriate directory to find your template file.
2. Click the template file to be set as default.
3. Click **Open** on the **Select Bibliographic Template** window.

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4. Click **OK** on the **Session Defaults and Preferences** window.
5. You will get a pop up message **Template updated**. Click **OK**.

Using the default template to create bib records

1. Click **New** icon on the tool bar of the cataloging module.
2. Edit the template to create a bib record.
3. Click **Save to DB** to save the bib record in Orbis.

How to delete templates

1. Click **File** on the menu bar.
2. Select **Template, Edit**.
3. Select the template you want to delete and click **OK**. The template you selected displays.
4. From the **File** menu, select **Template, Delete** and respond to the confirmation message.
5. Click **OK** to delete the selected template, or click **Cancel** to close the dialog without deleting the selected template.

Source URL: <https://web.library.yale.edu/cataloging/catman/creating-templates-voyager>