

Voyager 10 Cataloging Module Session Defaults and Preferences

To configure Session Defaults and Preferences in the Voyager Cataloging Module, select Options, then Preferences.

These defaults are basic guidelines. Consult your supervisor for specific defaults for your workflow.

General:

The screenshot shows the 'Session Defaults and Preferences' dialog box with the 'General' tab selected. The dialog has a title bar and a tabbed interface with tabs for General, Validation, Workflow, Item Defaults, Folders/Files, Mapping, Colors/Fonts, and RDA. The General tab contains several configuration options:

- Holdings/Item default location: sml
- Call Number Hierarchies: Library of Congress
- Bibliographic Import/Replace Profile: YL Import Conditional
- Bib Overlay Import/Replace Profile: YL Ivy Plus Merge
- Authority Import/Replace Profile: YL Auth Conditional

Below these are 'Default Field Order Configurations' with dropdowns for Authority, Bibliographic, and Holdings. There is also a checkbox for 'Sort automatically on save'. At the bottom, there are three checkboxes: 'Delete records from work files once saved to database' (checked), 'Delete records from import file once saved to database' (checked), and 'Display warning on module close' (unchecked). To the right of these are two more checkboxes: 'Add a subfield 'a' to a new field' (checked) and 'Display MARC Views maximized' (checked). At the very bottom are 'OK' and 'Cancel' buttons.

- Holdings/Item default location: select appropriate location, e.g. sml, beingen, etc.
- Call Number Hierarchies: Select "Library of Congress."
- Bibliographic Import/Replace Profile: Select "YL Import Conditional"

Note: Selecting any of the other profiles may result in the creation of duplicate bibliographic records or the unintended overlay of existing records. Users should not select any other profile unless they are performing work that requires bypassing the duplicate detection capabilities of "YL Import Conditional". Consult your supervisor before selecting an option other than YL Import Conditional".

- Authority Import/Replace Profile: Select "YL Auth Conditional".

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Note: Selecting any of the other profiles may result in the creation of duplicate authority records or the unintended overlay of existing records.

Validation:

The screenshot shows the 'Session Defaults and Preferences' dialog box with the 'Validation' tab selected. The 'Cataloging formats' dropdown is set to 'Yul 2000 tagtable'. Under the '856 link servers' section, there are input fields for 'URN:', 'DOI:', and 'Image Server:'. The 'Bypass' checkboxes for 'MARC Validation', 'MARC21 Character set validation', 'Authority Control Validation', 'Decomposition of accented characters for MARC21', 'ISBN validation', and 'ISSN validation' are all unchecked. The 'List all the errors' radio button is selected, and 'Show errors one at a time' is unselected. 'Display all the headings' is checked. Under the 'Heading Types' section, 'Name', 'Title', and 'Name/Title' are checked, while 'Subject' and 'Subdivision' are unchecked. The 'OK' and 'Cancel' buttons are at the bottom.

Session Defaults and Preferences

General Validation Workflow Item Defaults Folders/Files Mapping Colors/Fonts RDA

Cataloging formats: Yul 2000 tagtable

☐ Bypass MARC Validation ☐ Bypass MARC21 Character set validation

☒ List all the errors ☐ Show errors one at a time ☐ Bypass Authority Control Validation

☐ Bypass Decomposition of accented characters for MARC21 ☒ Display all the headings

☐ Bypass ISBN validation ☐ Bypass ISSN validation

856 link servers

URN:

DOI:

Image Server:

Heading Types

☒ Name

☒ Title

☒ Name/Title

☐ Subject

☐ Subdivision

OK Cancel

- Cataloging formats: Choose "YUL2000"
- Check "List all the errors" and "Display all the headings"
- Under Heading Types, check Name, Title, and Name/Title.

Workflow:

Session Defaults and Preferences

General | Validation | Workflow | Item Defaults | Eolders/Files | Mapping | Colors/Fonts | RDA Tools

- ☒ Retain last search
- ☒ Automatic truncation for non keyword searches
- ☒ Display record directly if search results in only one title
- ☐ Always create a holding when adding holdings to a bib (i.e., do not show existing holdings first)
- ☒ Display item record directly if item retrieve results in only one item
- ☐ Sequence new items at top
- ☐ Sequence new e-items at top
- ☒ Check for Duplicate Item Barcodes
- ☒ Suppress confirmation message upon successful save
- ☐ Update permanent location of attached items when MFHD is saved to the database
- ☐ Update item type of attached items when MFHD is saved to the database (based on item location definitions)
- ☒ Retain hierarchy selections

OK Cancel

- Suppress confirmation message upon successful save: optional.
- Update permanent location of attached items when MFHD is saved to the database: do not check this box, unless your specific workflow requires it to be checked. Consult your supervisor for the appropriate setting.
- Update item type of attached items when MFHD is saved to the database (based on item location definitions): This option will automatically gray out when "Update permanent location of attached items when MFHD is saved to the database" is unchecked.
- Retain hierarchy selections: optional.

Item defaults:

The screenshot shows the 'Session Defaults and Preferences' dialog box with the 'Item Defaults' tab selected. The dialog has a title bar and a tabbed interface with tabs for General, Validation, Workflow, Item Defaults, Folders/Files, Mapping, Colors/Fonts, and RDA. The 'Item Defaults' tab contains the following fields and controls:

- Item Type: A dropdown menu with 'circ' selected.
- Temp. Loc.: A dropdown menu.
- Status: A dropdown menu.
- Temp. Type: A dropdown menu.
- Stat. category: A dropdown menu.
- Enum: A text input field.
- Copy: A text input field with the value '0'.
- Chron: A text input field.
- Pieces: A text input field with the value '1'.
- Year: A text input field.
- Caption: A text input field.
- Free text: A text input field.
- Spine: A text input field.
- Self Check: A section containing two checkboxes: 'Magnetic Media' (unchecked) and 'Sensitize' (checked).

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Select "circ" as the default item type, unless your workflow requires a different item type. Consult your supervisor for the appropriate setting.

Folders/Files:

The screenshot shows the 'Session Defaults and Preferences' dialog box with the 'General' tab selected. The dialog has a title bar and a tabbed interface with tabs for General, Validation, Workflow, Item Defaults, Folders/Files, Mapping, Colors/Fonts, and RDA. The 'General' tab contains four main sections: 'Templates', 'Work Files', 'Folders', and 'Save to Local File'. Each section has input fields with browse buttons ('...').

Section	Field	Value
Templates	Bib:	c:\voyager\catalog\template\bit...
	Hldg:	c:\voyager\catalog\template\hld...
	Auth:	
Work Files	Bib:	
	Hldg:	
	Auth:	
Folders	Work:	
	Template:	
	Import:	c:\voyager\catalog\
Save to Local File	File:	
	Character Set:	Latin-1 (non-Unicode)

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- Templates:

Bib: c:\voyager\catalog\template\Preliminary record templates\PRELIMINARY.BIB.tem

Hldg: c:\voyager\catalog\template\hold.tem

Notes on Templates: The templates listed above are the default Voyager templates for bibliographic and holdings records. You can edit each of them by selecting File, then Template, then Edit. You can create new templates for specific activities or projects by selecting File, then Template, then New. To choose a new template as your default template for bibliographic, holdings, or authority records, select it instead of the default template listed above.

Important note: Adding a specific template to the default will prevent you from selecting another template you may wish to use. Once a template is entered into the preferences, the only way to use a template other than the one specified is to change the preferences. This would need to be done each time another template is desired. To avoid this situation, simply leave the template field blank in the preferences. You will then be prompted to select which template you want to use each time you wish to create a new record. If you are unsure whether to select a particular template or leave the field blank, consult your supervisor.

- Folders

Cataloging Policy: Generally cataloging staff will not use "work folders". However "work folders" may be appropriate for some special materials (i.e. manuscripts) or projects. Exceptions to this policy can be made with appropriate training and appropriate workflow.

- Import folder: The default path will be: Voyager/catalog

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You have to point to the path the first time you use the module. After that Voyager will always default to Voyager/Catalog.

Setting up Import Path in Voyager for OCLC

1) First create a folder on your hard drive.

C: Voyager

Catalog

File – New – Folder (rename it OCLCIMP)

To set up the export path in OCLC see [CONNEXION: Setting Export Options](#) [1]

- Work Files

Notes on Work Files: Use the Vendor source as the filename for each type of work file. For shared workstations, users should be sure to set this tab to save their work in their own files.

Bib: c:\voyager\BNA (or YBP, Cassalini, etc.)

Hldg: c:\voyager\BNA (or YBP, Cassalini, etc.)

You can use work files to save vendor records to be reviewed by a supervisor or another staff member.

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Save to Local File

File: Do not fill in.

Mapping:

The screenshot shows the 'Session Defaults and Preferences' dialog box with the 'Mapping' tab selected. The 'Expected Character Set of Imported Records' section has a dropdown menu set to 'MARC21 UTF-8'. The 'MARC Mapping for OCR Data' section has input fields for 'Tag' (500), 'Indicator 1' (empty), 'Indicator 2' (empty), and 'Subfield' (a). At the bottom are 'OK' and 'Cancel' buttons.

Tab	Expected Character Set of Imported Records	MARC Mapping for OCR Data
General		
Validation		
Workflow		
Item Defaults		
Folders/Files		
Mapping	MARC21 UTF-8	Tag: 500 Indicator 1: Indicator 2: Subfield: a
Colors/Fonts		
RDA		

- Local import: Choose MARC21 UTF-8. Failure to select the proper setting may result in problems with

diacritics and other special characters (e.g., super- and subscripts.)

Colors/Fonts:

Session Defaults and Preferences

General | Validation | Workflow | Item Defaults | Folders/Files | Mapping | Colors/Fonts | RDA

MARC Views (variable fields)

Bibliographic	Sample
Holdings	Sample
Authority	Sample
Conversion	Sample

Row Marker Symbol:

Record Hierarchy

Bibliographic	Sample	Holdings	Sample
Item	Sample	Bound With	Sample

Global Heading Change Hierarchy

Level 1: Old Heading	Sample
Level 2: New Heading	Sample
Level 3: Auth Heading	Sample

Search Result Colors

Suppressed Records	Sample
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Font

Name:

Size: Bold ☐

OK Cancel

All colors are taken from the top row of the color selection chart.

Recommended settings:

“Bibliographic” under “MARC views (variable fields)” and “Record hierarchy”

Text: Lime Green (slightly darker color located 3 down; 3 from left on color selection chart)

Background: Black

All other text colors should be set to black.

- Under “MARC views (variable fields):

Holdings background color: lemon yellow

Authority record background color: terra-cotta

Font: **Arial Unicode MS**

Size: 12

Bold: do not check this box. Diacritics are very difficult to read when “bold” is used.

Row marker symbol: choose the default arrow located at top of pull-down list.

- Under “Record hierarchy”:

Holdings background color: lemon yellow

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Item background: robin-egg blue

Bound with background: spring green

- Global headings change hierarchy: Do not select any colors for this box.
- Search Results Colors: suppressed records in the search results list will be indicated by the selected color.

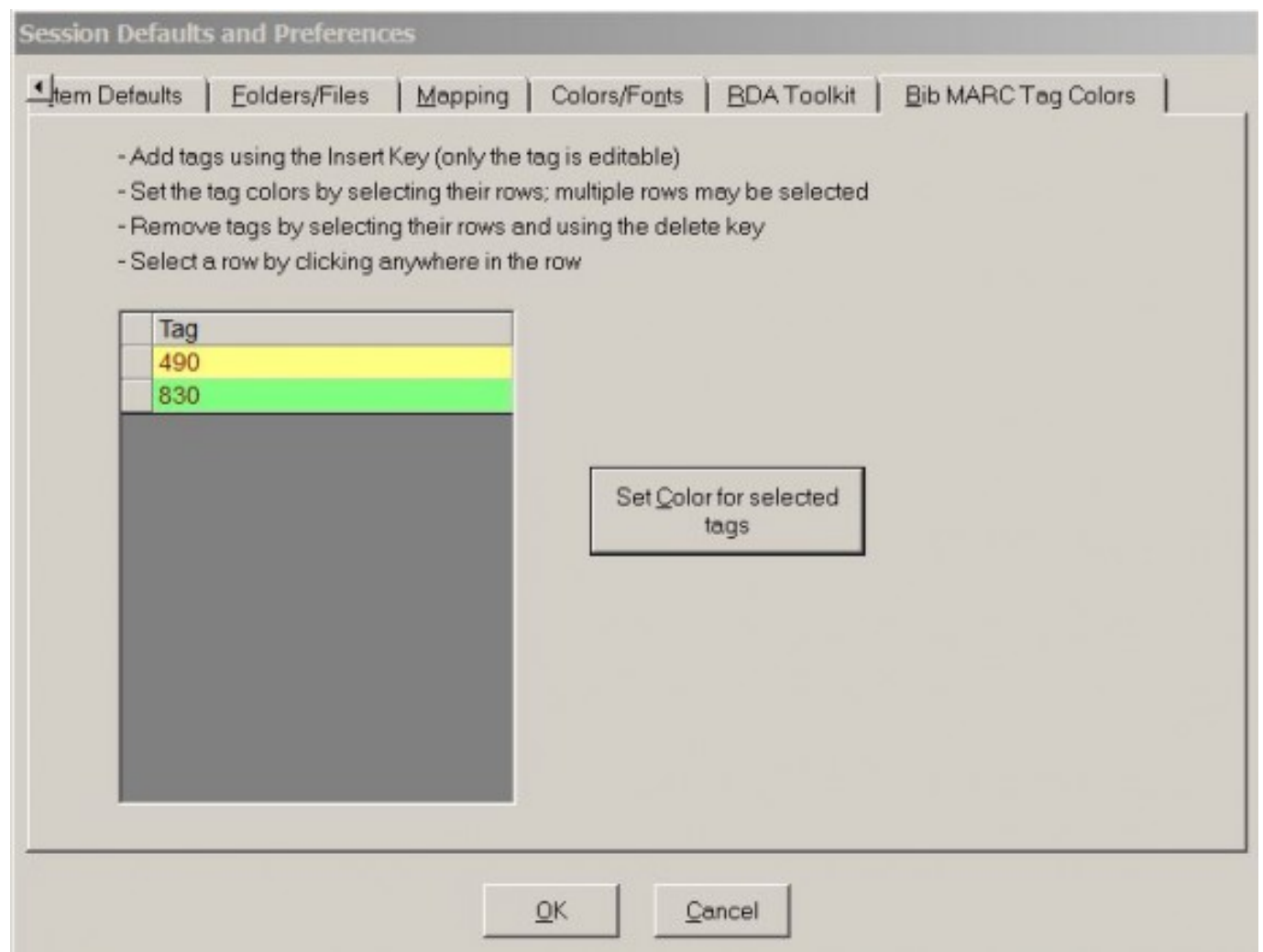
Note: The colors for bibliographic and holdings backgrounds should always be the same for each respectively in "MARC views" and "Record hierarchy". Although these settings may be changed at the operator's discretion, be aware that changes to font sizes and colors may affect your ability to see and work easily with all of the information.

RDA Toolkit:

The screenshot shows a dialog box titled "Session Defaults and Preferences" with a blue header bar. Below the header is a tabbed interface with the following tabs: Validation, Workflow, Item Defaults, Folders/Files, Mapping, Colors/Fonts, and RDA Toolkit. The "RDA Toolkit" tab is selected and active. Inside this tab, there are two text input fields: "Username:" and "Password:". Below these fields are two buttons: "OK" and "Cancel".

If appropriate, enter your RDA toolkit name and password

Bib MARC Tag Colors:



This option makes it possible to to set the background and text color of selected field tags.

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Source URL: <https://web.library.yale.edu/cataloging/voyager-10-defaults-preferences>

Links

[1] <https://web.library.yale.edu/cataloging/editing/connexion-export-options>