# 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**:



- 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".

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

**Validation**:



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

**Workflow**:

- 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**:

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

**Folders/Files**:

- 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 you 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

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.

- 
  Save to Local File
  File: Do not fill in.

**Mapping**:



- 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**:



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

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**:



If appropriate, enter your RDA toolkit name and password

**Bib MARC Tag Colors**:
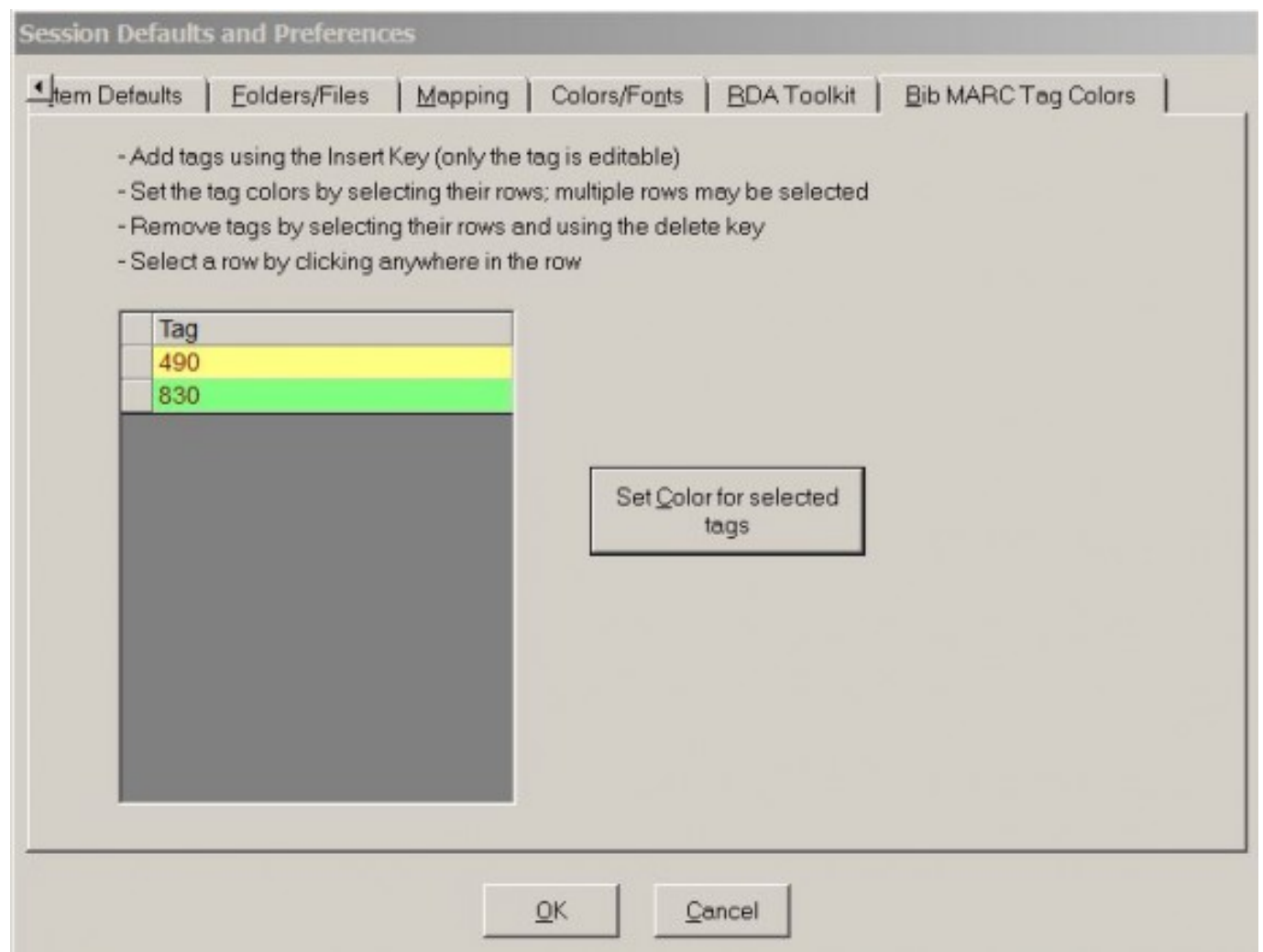
This option makes it possible to to set the background and text color of selected field tags.

**Effective Date:** January 2, 2018

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