Voyager Templates

Using Existing Templates

Voyager Cataloging Module must be open.

Setting a template as the default	*Use this option if you are going to be working on many items of the same format one after another.*
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. The window **Select Bibliographic Template** will pop up. 7. Select the template that you would like to set as your default and click **OK**. 8. Click **OK** on the Session **Defaults and Preferences** window. **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.	Tip: If at Step 5 the window opens in **Voyager Extensions** rather than **Select Bibliographic Template**, 1. Go back to **Folders/Files** 2. Under **Folders**, click the … box at the end of the **Template** directory. 3. The window **Select Directory** will pop up. 4. Double-click on the c: folder icon. 5. A list of folders under c: will display. Use the scrollbar to find the **Voyager folder** (NOT **Voyager Extensions**) & double-click to open. 6. A list of folders under **Voyager** will open. Scroll to the **Catalog** folder and double-click. 7. A list of folders under c:\voyager\catalog will display. Scroll down to the **Template** folder and double click. 8. The **preliminary record template** folder will display under Template. Click on the **preliminary record template** folder to select it and click the OK button at the top of the **Select Directory** window. 9. Click OK on **Session Defaults and Preferences** to save.
Selecting a template, editing, and saving into Orbis	*Use this option if you are working on a single item in any given format.*
1. Click **Open** icon on the tool bar of cataloging module. 2. A dialogue window **Select Work File** will pop up. 3. Change the Files of type to **All (*.*).** 4. Select the appropriate directory to find your template file (**C:\Voyager\Catalog\Template\…**) 5. Click your template file. Click **Open**. 6. A small window **Select work record** will pop up. Click **OK** to open the template record. 7. Edit the record to make it a bib record. 8. Under File, click **Save as** and save to	

workfile.

9. When all records are created, go to workfile and select records to be saved to database.
10. Click **Save to DB** icon on the tool bar of the cataloging module.

Creating New cataloging templates

Voyager Cataloging Module must be open.

Creating a New Template	*Use this option to create and modify templates of your own.*

Creating a New Template

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 **Create a New Record** will pop up. Select **Bibliographic** as the record type, and click **OK**.
5. 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.
6. After you have finished editing, click **File** on the menu bar.
7. Click **Save**.
8. The default directory of your template file should be in **C:\Voyager\Catalog\Template…** If not, find the directory.
9. To save your template directly in this folder, give your template a name and click **Save**.
10. 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 **Open Template File** 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 Template

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.
5. Select your template file and click **Open**.
6. Edit your template file.

7. Click **Save** icon on the tool bar of cataloging module.
8. You will get a pop up message **Template updated**. Click **OK**.

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