

## Voyager Templates

### Using Existing Templates

Voyager Cataloging Module must be open.

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| <p><b>Setting a template as the default</b></p> <ol style="list-style-type: none"> <li>1. Click <b>Options</b> on the menu ?bar.</li> <li>2. Select <b>Preferences</b>.</li> <li>3. The window <b>Session Defaults and Preferences</b> will pop up.</li> <li>4. Click the tab <b>Folders/Files</b>.</li> <li>5. Under <b>Templates</b>, click the ... box at the end of <b>Bib</b> directory.</li> <li>6. The window <b>Select Bibliographic Template</b> will pop up.</li> <li>7. Select the template that you would like to set as your default and click <b>OK</b>.</li> <li>8. Click <b>OK</b> on the <b>Session Defaults and Preferences</b> window.</li> </ol> <p><b>Using the default template to create bib records</b></p> <ol style="list-style-type: none"> <li>1. Click <b>New</b> icon on the tool bar of the cataloging module.</li> <li>2. Edit the template to create a bib record.</li> <li>3. Click <b>Save to DB</b> to save the bib record in Orbis.</li> </ol> | <p><i>Use this option if you are going to be working on many items of the same format one after another.</i></p> <p>Tip: If at Step 5 the window opens in <b>Voyager Extensions</b> rather than <b>Select Bibliographic Template</b>,</p> <ol style="list-style-type: none"> <li>1. Go back to <b>Folders/Files</b></li> <li>2. Under <b>Folders</b>, click the ... box at the end of the <b>Template</b> directory.</li> <li>3. The window <b>Select Directory</b> will pop up.</li> <li>4. Double-click on the c: folder icon.</li> <li>5. A list of folders under c: will display. Use the scrollbar to find the <b>Voyager folder</b> (NOT <b>Voyager Extensions</b>) &amp; double-click to open.</li> <li>6. A list of folders under <b>Voyager</b> will open. Scroll to the <b>Catalog</b> folder and double-click.</li> <li>7. A list of folders under c:\voyager\catalog will display. Scroll down to the <b>Template</b> folder and double click.</li> <li>8. The <b>preliminary record template</b> folder will display under <b>Template</b>. Click on the <b>preliminary record template</b> folder to select it and click the <b>OK</b> button at the top of the <b>Select Directory</b> window.</li> <li>9. Click <b>OK</b> on <b>Session Defaults and Preferences</b> to save.</li> </ol> |
| <p><b>Selecting a template, editing, and saving into Orbis</b></p> <ol style="list-style-type: none"> <li>1. Click <b>Open</b> icon on the tool bar of cataloging module.</li> <li>2. A dialogue window <b>Select Work File</b> will pop up.</li> <li>3. Change the Files of type to <b>All (*.*)</b>.</li> <li>4. Select the appropriate directory to find your template file<br/><b>(C:\Voyager\Catalog\Template\...)</b></li> <li>5. Click your template file. Click <b>Open</b>.</li> <li>6. A small window <b>Select work record</b> will pop up. Click <b>OK</b> to open the template record.</li> <li>7. Edit the record to make it a bib record.</li> <li>8. Under File, click <b>Save as</b> and save to</li> </ol>  | <p><i>Use this option if you are working on a single item in any given format.</i></p>   |

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

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**.

*Use this option to create and modify templates of your own.*

#### 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 existing template.
4. The dialogue box **Open Template File** will pop up.
5. Select your template file and click **Open**.
6. Edit your template file.

## Voyager Templates

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| <ol style="list-style-type: none"><li>7. Click <b>Save</b> icon on the tool bar of cataloging module.</li><li>8. You will get a pop up message <b>Template updated</b>. Click <b>OK</b>.</li></ol> |  |
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**Source URL:** <https://web.library.yale.edu/cataloging/voyager-templates>