

Cataloging Module: Session Defaults and Preferences Configuration

Scope: This document explains how to configure Session Defaults and Preferences in the Voyager Cataloging Module. It is accomplished by selecting **Options**, then **Preferences**.

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NOTE: Examples below assume that the Voyager clients are located on the staff member's C:\ drive. If the Voyager clients on the workstation you are configuring are located on the D:\ or E:\ drive, substitute the letter of that drive for C:\ in all instances below.

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General

- **Holdings/Item default location**

This setting determines the default location for any holdings or item records created during a cataloging session. The proper setting here will vary among the processing centers. Consult your supervisor for the appropriate setting.

- **Call Number Hierarchies**

Select "Library of Congress."

For more information on Call Number Hierarchies, see: [Call Number Hierarchy](#)

- **Bibliographic Import/Replace Profile**

- Select "ImportConditional."

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 ImportConditional. Consult your supervisor before selecting an option other than Import/Conditional.

For more information on Bibliographic Import/Replace profiles, see: [Bibliographic Import/Replace Profiles](#)

- **Authority Import/Replace Profile** Select "AuthImportConditional"

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

For more information on Authority Import/Replace profiles, see: [Authority Import/Replace Profiles](#)

- **Delete records from work files once saved to database**

Check this box.

- **Delete records from import file once saved to database**

Check this box.

- **Add a subfield "a" to a new field**

Check this box.

- **Display MARC views maximized**

- Check this box.

Validation

- **Cataloging formats**

Choose "Unicode."

- **Bypass MARC validation**

Do not check this box.

(Exception: Access Services staff using Image Server -- Do check this box).

- **Bypass Authority Control validation**

Do not check this box.

(Exception: Access Services staff using Image Server -- Do check this box).

- **Heading Types**

Check the "Names" box.

Note: If the "Display all the Headings" box is checked, Voyager will show valid, invalid, and partially valid headings when it checks the record against the authority file. Leaving the box unchecked will result in the display of only those headings that Voyager finds invalid or partially valid. If the record has no invalid or partially valid headings, you will only see the "Record successfully updated" message.

It is recommended that those doing fastcatting and other copy cataloging check only the "Names" box in the "Heading Types" list. Those doing original cataloging may check additional boxes if they desire. Checking additional boxes may result in slower response time when saving records to the database.

- **856 Link Servers**

Do not fill in any information here.

(Exception: Access Services staff using Image Server -- In the box labeled "Image Server" enter: c:\symtrix\iadm.exe).

Work Flow

- **Retain Last Search**

Check this box.

- **Automatic truncation for non keyword searches**

Check this box.

- **Display bibliographic record directly if search results in only one title**

Check this box.

Checking this box allows you to display a bib record without first selecting it from a list if only one title is retrieved by your search.

- **Always create a holding when adding holdings to a bib**

Do not check this box.

Checking this box will automatically add a new holdings to a bib record without first displaying the existing holdings already attached to that bib.

- **Display item record directly if item retrieve results in only one item**

Check this box.

- **Sequence new items at top**

Do not check this box.

- **Check for duplicate item barcodes**

Check this box.

- **Suppress confirmation message upon successful save**

Do not check this box.

Item Defaults

- **Item Type** *Note: This field is required.*

Select "book" as the default item type (*Exception: Access Services staff using Image Server -- Select "nocirc" as the item type*). If you frequently work with non-book materials, you may need to select another item type. Consult your supervisor for the appropriate setting.

Set the copy number to 1.

Do not fill in any of the other fields.

Folders/Files

Configure files and folders as below, creating both files and folders as needed, if they are not already present on the workstation you are configuring.

- **Templates (TECH SERVICES STAFF ONLY; Access Services staff using Image Server, see Templates for Access Services Staff below)**

Bib: c:\voyager\catalog\template\bib.tem

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

Auth: c:\voyager\catalog\template\auth.tem

Notes on Templates: The templates listed above are the default Voyager templates for bibliographic, holdings, and authority 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 bib (holdings, authority) record. If you are unsure whether to select a particular template or leave the field blank, consult your supervisor.

- **Templates (ACCESS SERVICE STAFF USING IMAGE SERVER ONLY; Tech Services staff, see Templates for Tech. Services Staff above)**

Bib: c:\voyager\catalog\template\ImagServBIB.tem

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

OR

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

- **Folders**

Work: C:\Voyager\Work\

Template: C:\Voyager\Catalog\Template

Import: C:\Voyager\Import

Notes on the Work Folder: The Voyager\Work folder is intended as the default folder in which to save records to work files. Staff in training may be directed to save work files to a shared folder that can be accessed by the person reviewing their work.

Notes on the Template Folder: Store all personalized default and individually created original templates in the C:\Voyager\Catalog\Template folder on your workstation. Standard Cornell versions of the commonly used templates can be copied from the Cataloging\Template folder on the digilib server.

Notes on the Import Folder: Setting the Import Folder to the Voyager\Import folder as above will cause Voyager to look in this folder for files of records imported from OCLC, RLIN, or other sources. You must also configure OCLC and RLIN to export records to this folder.

To configure OCLC Passport to use the Voyager\Import folder, open the session you want to configure by selecting Session, then Open. With the session open, select Session, then Settings. Select the Export/Transfer tab and then select the Create button. From the New Export Destination window, select File, then OK. (To do the next step you will need to have already created the Voyager\Import folder, in either Voyager, Windows Explorer, etc.) Point to C:\Voyager\Import in the Folders window, type in export.dat in the File name window, and select OK. Follow these steps for all OCLC sessions to be configured.

To configure the OCLC MicroEnhancer to use the Voyager\Import folder, select Tools, then Options. Select the Export tab and then the Create button. Follow the remaining steps listed for OCLC Passport in the preceding paragraph.

- **Work Files**

Bib: c:\voyager\work\[netid].bib

Hldg: c:\voyager\work\[netid].hld

Auth: c:\voyager\work\[netid].aut

Notes on Work Files: Use the cataloger's network ID number 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.

You can use work files to save edited records that have not yet been saved to the database. You can also use work files to save records to be reviewed by a supervisor or another staff member.

- **Save to Local File**

File: Do not fill in.

Character Set: Inactive when File not selected.

Notes on Save to Local File: A standard use for this feature has not been established.

Mapping

Expected character set of Imported Records

- **Local import**

To import records from OCLC, change to **MARC21 MARC-8 (non-Unicode)**.

- ***MARC mapping for OCR data***

Do not fill in any values in this field.

Colors/Fonts

These settings may be changed at the operator's discretion. Be aware, however, that changes to font sizes may affect your ability to see all of the information in the bibliographic record.