Voyager® with Unicode™
Cataloging User's Guide

Endeavor Information Systems, Inc.

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About This Document

Purpose

This document provides instructions for working with the Cataloging module.

Intended Audience

This document is intended for Voyager customers who are responsible for customizing and implementing Voyager Cataloging.

Reason for Reissue

This manual incorporates and is being reissued for the following reasons.

- Unicode™ implementation
- Merger of the *Voyager Bibliographic Record Linking & MARC Derivation of Records User's Guide* information specific to the Cataloging module into the *Voyager Cataloging User's Guide*
- New section in the About chapter regarding permission to reproduce documentation
- Changes requested through Customer First feedback

How to Use This Document

This document consists of the following:

Chapter 1	"Getting Started" Chapter 1 provides an overview of Cataloging, including logging into the application, printing screens, and exiting ffrom the application.
Chapter 2	"Record Types and Creating" Chapter 2 discusses the different types of records used by the Voyager system to contain your MARC records and procedures for editing the leader and other related MARC tags.
Chapter 3	"Creating, Opening, and Viewing Records" Chapter 3 details the creation of new records, and opening and viewing existing records.
Chapter 4	"Changing, Saving, and Printing Information" Chapter 4 details editing records, saving edited records and printing records, spine, and piece labels.
Chapter 5	"Cataloging & Bibliographic Record Linking" Chapter 5 details the implementation and use of bibliographic record linking from within the Cataloging module for related records.
Chapter 6	"Diacritics and Non-Roman Characters" Chapter 6 details the implementation and considerations of diacritics and non-Roman characters in a Unicode environment.
Chapter 7	"Pick and Scan" Chapter 7 details the procedure for using the Pick and Scan feature.
Chapter 8	"Templates" Chapter 8 details the procedure for using templates when working with new records.
Chapter 9	"Authority Control" Chapter 9 details the methods of maintaining Authority Control.
Chapter 10	"Session Defaults and Menu Options" Chapter 10 details Session Defaults and Preferences for application throughout the Cataloging module, and also gives a list of options available through the menus at the top of the Cataloging window.
Appendix A	"MARC Tag Tables" Appendix A contains information on viewing, using and configuring the MARC tag tables used by the Cataloging client.

Appendix B	"Voyager Call Number Logic / Processing" Appendix B contains information on using different classification schemes with the Cataloging module.
Appendix C	"Voyager with Unicode Considerations" Appendix C contains information regarding considerations relative to the Voyager with Unicode™ implementation.
Index	The Index is an alphabetical, detailed cross-reference of topics about which this document contains information.

Conventions Used in This Document

The following conventions are used throughout this document:

- Names of commands, variables, stanzas, files, and paths (such as `/dev/tmp`), as well as selectors and typed user input, are displayed in `constant width` type.
- Commands or other keyboard input that must be typed exactly as presented are displayed in **`constant width bold`** type.
- Commands or other keyboard input that must be supplied by the user are displayed in ***`constant width bold italic`*** type.
- System-generated responses such as error messages are displayed in `constant width` type.
- Variable *portions* of system-generated responses are displayed in *`constant width italic`* type.
- Keyboard commands (such as **Ctrl** and **Enter**) are displayed in **bold**.
- Required keyboard input such as "Enter **`vi`**" is displayed in **`constant width bold`** type.
- Place holders for variable portions of user-defined input such as **`ls -l`** ***`filename`*** are displayed in ***`italicized constant width bold`*** type.
- The names of menus or status display pages and required selections from menus or status display pages such as "From the **Applications** drop-down menu, select **System-wide**," are displayed in **bold** type.
- Object names on a window's interface, such as the **Description** field, the **OK** button, and the **Metadata** tab, are displayed in **bold** type.
- The titles of documents such as *ENCompass Web Client User's Guide* are displayed in *italic* type.
- Caution, and important notices are displayed with a distinctive label such as the following:

NOTE:
Extra information pertinent to the topic.

IMPORTANT:
Information you should consider before making a decision or configuration.

CAUTION:
Information you must consider before making a decision, due to potential loss of data or system malfunction involved.

TIP:
Helpful hints you might want to consider before making a decision.

RECOMMENDED:
Preferred course of action.

OPTIONAL:
Indicates course of action which is not required, but may be taken to suit your library's preferences or requirements.

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To contact Endeavor Information Systems, Inc. use the following numbers:

North America (Corporate Headquarters)

Endeavor Information Systems Inc.
2200 E. Devon Avenue
Suite 382
Des Plaines, IL 60018-4505
United States

800-762-6300 (toll free from within N. America only)
info@endinfosys.com

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Phone: 800-4444-3474

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European Office

Endeavor Information Systems Inc.
Harcourt Place
32 Jamestown Road,
Camden
London NW1 7BY

+44 (0)20 7424 4400 (Voice)
+44 (0)20 7424 4409 (Fax)
info.europe@endinfosys.com (E-Mail)

Australian Office

Endeavor Information Systems Inc.
Suite 129, 85 Grattan Street
Carlton. Vic. 3053
Australia

08 8336 9474 (Voice- from within Australia)
+61 8 8336 9474 (Voice- from outside Australia)
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Getting Started

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Getting Started

1

Introduction

This chapter describes the prerequisite installation and configuration informatin necessary for beginning work in the Cataloging module.

For information on how the settings in the System Administration module affect the Cataloging module, see the *Voyager System Administration User's Guide*.

Purpose of this Chapter

The purpose of this chapter is to provide prerequisite information needed for using and customizing the Cataloging module.

Prerequisite Skills and Knowledge

To use this document effectively, you need knowledge of the following:

- Basic Microsoft® Interface navigation
- Basic UNIX® commands and navigation
- Basic Voyager® System Administration Module
- Basic WebVoyáge® configuration

- Intermediate knowledge of MARC record formats (for creating customized WebVoyage display directories)

Before You Begin

Working with the Voyager Cataloging software is enhanced by the availability of documentation, online help, and the use of common conventions. This section describes the purpose of these resources in order for you to effectively use them.

Documentation and Online Help

The documentation and online help are designed to work together to provide you with the information you need when you need it. You can access online help by pressing the F1 function key (**F1**) on your keyboard.

The user's guides are designed to cover the applications in greater detail to include screen shots, advanced topics, and cross references to other user's guides and topics.

Conventions

Most conventions used in the Voyager documentation are Windows standard conventions. For more information about these conventions, please refer to your Windows documentation.

Commands

Voyager functions and activities are accessed primarily through the menu and sub-menu options. To designate which menus and sub-menus are being referred to in the user's guides and online help, we have adopted a convention of specifying the menu, sub-menu, and function or activity. For example, referring to the Exit activity on the File menu is specified as **File>Exit**.

Ellipsis Button

The **Ellipsis** button (see Figure 1-1) indicates that additional information is available either in a dialog box or in an expanded textbox. Click the **ellipsis** button to access this additional function or information.

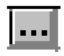

Figure 1-1. Ellipsis Button

Keyboard Functions

Some functions listed on Voyager menus have corresponding keyboard equivalents. In addition, certain functions are assigned keyboard shortcuts. Both types of keyboard access are described below. Keyboard equivalents and shortcuts are indicated on the menus.

Keyboard equivalents allow you to perform activities without requiring you to use the mouse. Keyboard equivalents are indicated by an underlined letter in the name of a menu or function. To access a menu or function using keyboard equivalents, press the alternate key (**Alt**) followed by the underlined letter. For example, to exit a Voyager module, press and release the **Alt** key, followed by the **f** key (for the **File** menu), followed by the **x** key (for **Exit**).

A number of functions are also assigned keyboard shortcuts. Keyboard shortcuts allow you to press and hold the control key (**Ctrl**) and then press the designated letter. For example, when the Save command is available you can press and hold the **Ctrl** key followed by the **s** key (for **Save**).

Following Windows conventions, the tab key (**Tab**) can be used to move the cursor to fields and buttons within dialog boxes and windows. Press and hold the **Shift** key and then press the **Tab** key to move the cursor in the opposite direction through the dialog box.

The **F4** function key (or **F8** in some instances) can be used to display **drop-down arrow** selections. These keys can also be used to display fields represented by **ellipsis** button. In addition, items listed in drop-down menus can be scrolled through by typing the first letter of the item that you want to display. To scroll through additional items that begin with the same letter, type that letter again.

You can use the arrow keys on your keyboard to move through lists of options. The **up** and **down arrows** can also be used to select radio buttons. The escape key (**ESC**) can be used to close certain dialog boxes. The **space bar** can be used to highlight selections in list boxes. Once a selection has been highlighted in a list box, you can press the **Enter** key to select it.

Logging into Cataloging

Before you can begin working in Voyager's Cataloging module, you must log in with your operator ID and password. Your operator ID and password determine what Cataloging operations you can perform as well as at which Cataloging locations you can perform them. Your system administrator defines this security information in the Voyager System Administration module. See the *Voyager System Administration User's Guide* for details.

The procedure for logging into cataloging is described in Procedure 1-1, Logging into Cataloging.

Procedure 1-1. Logging into Cataloging

Use the following to access Voyager Cataloging.

1. Open the Cataloging module on your PC.

   Result: The **Login** dialog box opens (see Figure 1-2).

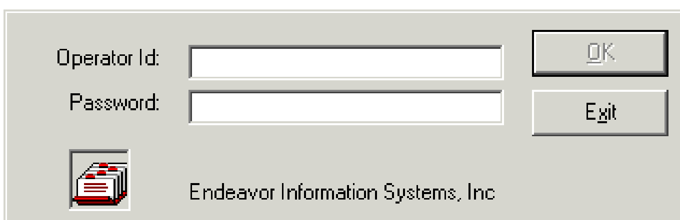

Figure 1-2. The Voyager Cataloging login dialog box

2. Enter your **Operator Id**, **Password**, and click **OK** or **Exit**.

   Result: The main Cataloging window displays if you successfully entered your **Operator Id** and **Password**. Using **Exit** closes the log in dialog box without logging you into the Cataloging module.

NOTE:
Voyager allows you to make up to three unsuccessful attempts to log in before terminating the program.

3. (Optional) For systems with more than one happening location defined in Voyager System Administration, a **Select a cataloging location** dialog box displays from which you need to select an appropriate Cataloging location (see Figure 1-3); and click **OK**.

   Result: The main Cataloging window displays.

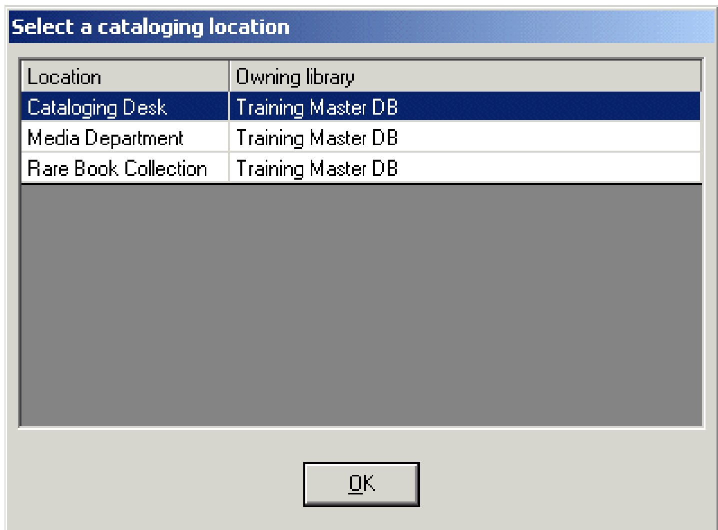

Figure 1-3. Select a cataloging location dialog box

Exiting Cataloging

You can exit Cataloging by selecting **File>Exit**. If you have open records that have been edited but not saved, you are asked to save the records or ignore the changes.

Record Types and Creating

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Record Types and Creating

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Introduction

Voyager's Cataloging module provides a powerful and user-friendly means by which MARC 21-based records are created and maintained. You can create authority, bibliographic, holdings, and item records using the convenient and straightforward record displays. Integration between Cataloging and the Online Public Access Catalog (OPAC) means that you can easily build and maintain a complete, MARC 21-based catalog.

Types of Records

Voyager uses MARC 21 standard authority, bibliographic, and holdings records and a Voyager-defined item record (see Table 2-1 on page 2-1). The bibliographic record is the key component in the relationship of these different types of records. See Figure 2-1.

Table 2-1. Description of Record Types

	Authority	**Bibliographic**	**Holdings (MFHD)**	**Item**
Format	MARC 21	MARC 21	MARC 21	Voyager
Linked to	Bibliographic		Bibliographic	Holdings
Source	Original or Utility	Original or Utility	Original	Original

Authority records are optional and link to bibliographic records as either type of record is saved.

A Holdings record is also known as a MFHD, MARC Format for Holdings Data.

Item records are used for circulating library material.

Record Relationships

Holdings records are linked to bibliographic records to represent each copy that your library has. Item records are linked to holdings records for each volume and/or circulating piece of a copy (Figure 2-1).

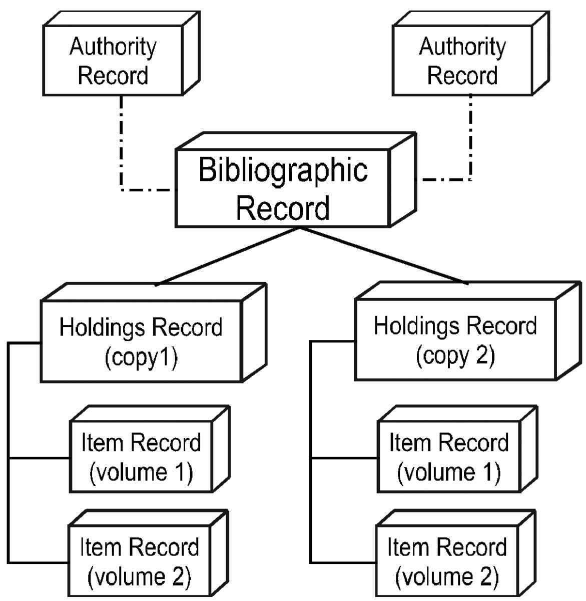

Figure 2-1. Voyager record relationships

Fields

Voyager uses the **852** field for the location and call number.

- Subfield **b** records the item's location using location codes defined in System Administration.
- Subfields **h** and **i** have the call number.

IMPORTANT:
These are the only indexed fields in the holdings record.

The **866** field is often used to display a library's summary holding information for serials and multi-volume sets. This displays in the OPAC to inform library patrons of what you own.

Voyager item records include information about an item's permanent and temporary location and an item's type and temporary type. This information along with the barcode stored in the item record is used by the Circulation module for circulation transactions. The copy number, enumeration, and chronology fields in an item record are used to augment the OPAC display when the item is charged out or has another informational status.

Bibliographic Records

Bibliographic records contain all the bibliographic information for a library item.

The bibliographic record displays with the following three tabs.

- MARC tab
- System tab
- History tab

For information about creating a bibliographic record, see Creating a Record on page 3-1.

Only the **MARC** and **System** tabs display when you initially create a bibliographic record. Subsequently, the **History** tab displays when an action is taken against the record such as saving it to the database.

MARC Tab

The **MARC** tab of the bibliographic record (see Figure 2-2) contains a **Leader**, an **005** fixed field, an **008** fixed field, and variable fields. It can also contain multiple **006** and **007** fields. All values correspond to the published MARC standard.

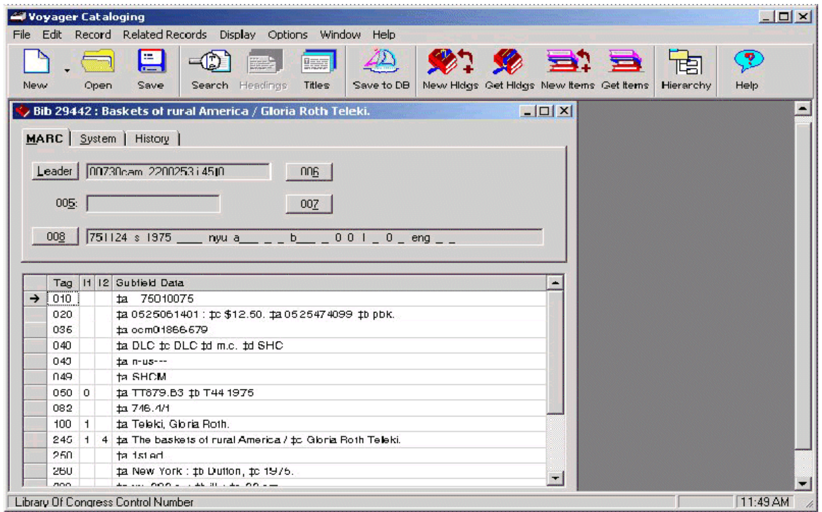

Figure 2-2. Bibliographic Record - MARC Tab

Bibliographic Leader

The Bibliographic Leader information allows you to select the Bibliographic Record Status, Type of Record, Bibliographic Level, Type of Control, Encoding Level, and Cataloging Form.

The Bibliographic Leader displays as a grid which is completely configurable using Voyager's MARC tag tables. See MARC Tag Tables on page A-1 for details on the MARC tag tables.

The procedure for viewing the Bibliographic Leader is shown in Procedure 2-1, Viewing the Bibliographic Leader, on page 2-4.

Procedure 2-1. Viewing the Bibliographic Leader

Use the following to select the Bibliographic Leader information from a bibliographic record.

1. Click the **Leader** button (Figure 2-3).

Figure 2-3. Bibliographic Leader Button

Result: The **Leader** dialog box opens as a grid (Figure 2-4).

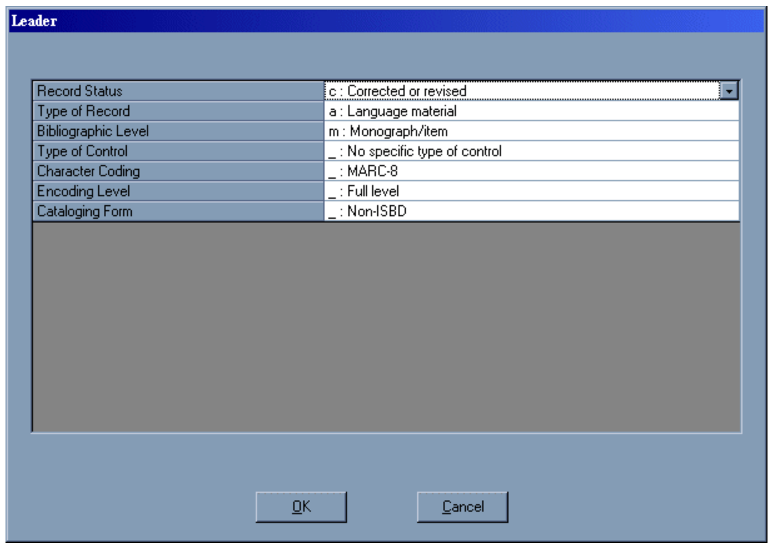

Figure 2-4. Leader dialog box

2. Select values from the grid by clicking a particular cell and the down arrow to display drop-down menu selections.

   Result: Leader options display for you to select.

NOTE:
Use either the mouse or the up/down arrow keys on your keyboard to move from cell to cell within the grid or from option to option in the drop-down lists. The **Tab**

key is not available for use within the grid. Using the **Tab** key takes you outside the grid altogether.

TIP:
*You can also enter the letter or number that precedes an option in a drop-down list to make a selection. For instance, if you want to jump from subfield **z** within the drop-down list to subfield **a**, simply press the letter **a**.*

3. Click **OK** or **Cancel**.

   Result: This saves your work and exits the **Leader** dialog box or exits the dialog box without saving.

Bibliographic 005 Fixed Field

The **005** field is a system-applied field containing 16 characters that specify the date and time of the latest record transaction. These characters are recorded in the pattern YYYYMMDDHHMMSS.F that represents year, month, day, hour, minute, second, and decimal fraction of a second.

Bibliographic 006 Fixed Field

The **006** field is a repeatable field that allows you to add other bibliographic formats.

The **006** field displays as a tabbed dialog box which is completely configurable using Voyager's MARC tag tables. See MARC Tag Tables on page A-1 for details on the MARC tag tables.

The procedure for editing the **006** field on the **MARC** tab is shown in Procedure 2-2, Editing the 006 Field, on page 2-6.

Procedure 2-2. Editing the 006 Field

Use the following to edit the **006** field on the **MARC** tab of an open bibliographic record.

1. Click the **006** button (see Figure 2-5) on the **MARC** tab of an open bibliographic record.

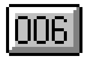

Figure 2-5. 006 Button

Result: The **006** field displays a tabbed dialog box (see Figure 2-6) from which you can select a bibliographic format type.

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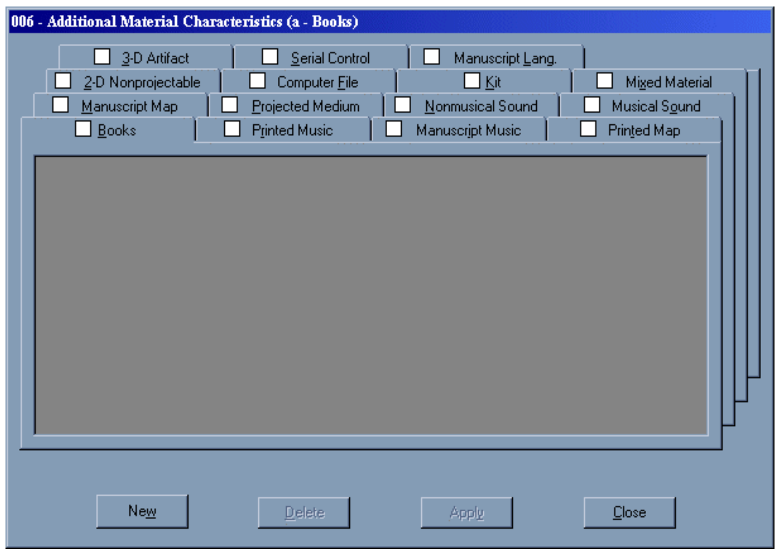

Figure 2-6. 006 dialog box

2. Select a tab representing the bibliographic format type you want to enter.

   Result: A blank tab displays with the **New** button active.

TIP:
You can use the mouse or keyboard shortcuts to access tabs. To use the keyboard shortcut, hold the **Alt** key; and type the letter that is underlined in the tab name such as **Alt+b** to access the **Books** tab. *See* *MARC Tag Tables* *on* *page A-1* *for details on how to define your own keyboard access keys.*

3. Click the **New** button.

Result: A grid displays with various options (see Figure 2-7).

4. Select options from the grid by clicking a particular cell, and the down arrow to display drop-down menu selections.

NOTE:
Use either the mouse or the up/down arrow keys on your keyboard to move from cell to cell within the grid or from option to option in the drop-down lists. The **Tab** key is not available for use within the grid. Using the **Tab** key takes you outside the grid altogether.

TIP:
*You can also enter the letter or number that precedes an option in a drop-down list to make a selection. For instance, if you want to jump from subfield **z** within the drop-down list to subfield **a**, simply press the letter **a**.*

5. Click **Apply**.

Result: This stores the options you selected and a check mark displays in the check box directly to the left of the tab name indicating that values have been selected for that tab. See Figure 2-7 which has values for the **Books** tab added and applied.

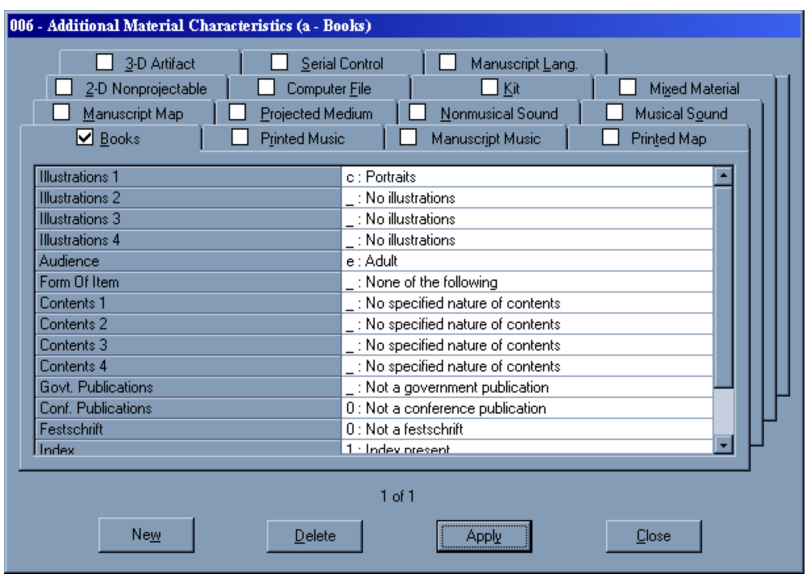

Figure 2-7. Bibliographic 006: Grid displayed and values set

NOTE:
The **Delete** button becomes active allowing you to delete what you have applied.

6. Click **Close**.

   Result: You exit the 006 linking field dialog box.

Bibliographic 007 Fixed Field

The **007** field is a repeatable field that allows you to add other material categories.

The Bibliographic **007** field displays as a grid which is completely configurable using Voyager's MARC tag tables. See MARC Tag Tables on page A-1 for details on the MARC tag tables.

The procedure for editing the **007** field on the **MARC** tab is shown in Procedure 2-3, Editing the 007 Field, on page 2-9.

Procedure 2-3. Editing the 007 Field

Use the following to edit the **007** field on the **MARC** tab of an open bibliographic record.

1. Click the **007** button (see Figure 2-8) from the **MARC** tab of an open bibliographic record.

Figure 2-8. 007 Button

Result: The **007** field displays a tabbed dialog box (see Figure 2-9) from which you can select a material category.

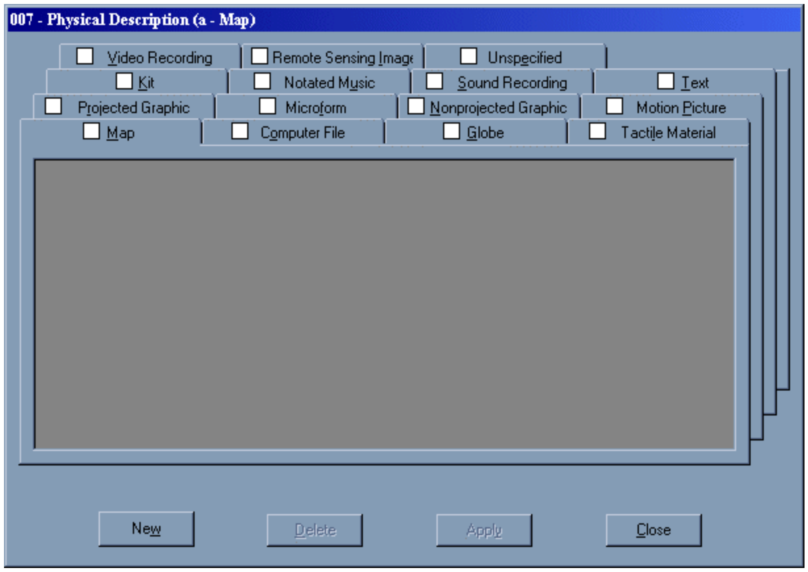

Figure 2-9. 007 - Physical Description dialog box

2. Select a tab representing the physical material you want to enter.

   Result: A blank tab displays with the **New** button active.

TIP:
*You can use a mouse or keyboard shortcuts to access tabs. To use the keyboard shortcut, hold the **Alt** key; and type the letter that is underlined in the tab name such as **Alt+m** to access the **Map** tab. See* *MARC Tag Tables on page A-1* *for details on how to define your own keyboard access keys.*

3. Click the **New** button.

   Result: A grid displays with various options (see Figure 2-10).

4. Select options from the grid by clicking a particular cell, and the down arrow to display drop-down menu selections.

   Result: You can enter the **007** field information to match your material.

NOTE:
Use either the mouse or the up/down arrow keys on your keyboard to move from cell to cell within the grid or from option to option in the drop-down lists. The **Tab**

key is not available for use within the grid. Using the **Tab** key takes you outside the grid altogether.

TIP:
*You can also enter the letter or number that precedes an option in a drop-down list to make a selection. For instance, if you want to jump from subfield **z** within the drop-down list to subfield **d**, simply press the letter **d**.*

5. Click **Apply**.

   Result: This stores the options you selected and a check mark displays in the check box directly to the left of the tab name indicating that values have been selected for that tab. See Figure 2-10 which has values for the **Books** tab added and applied.

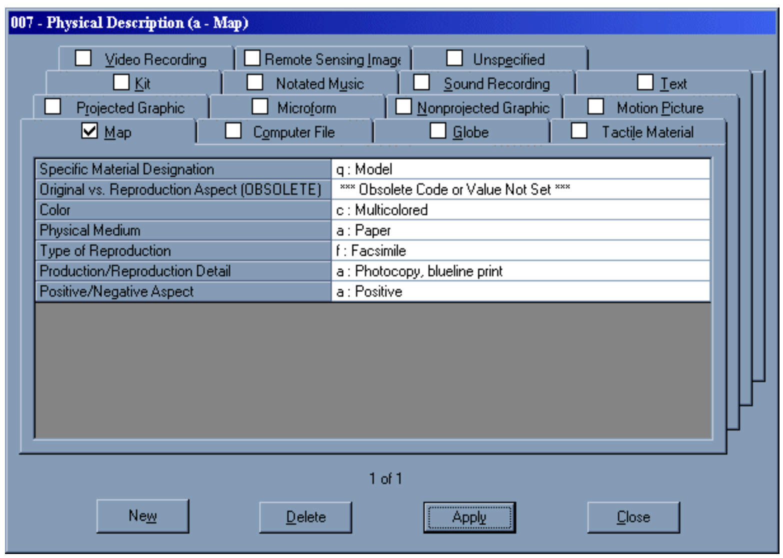

Figure 2-10. 007 - Physical description dialog box with grid displayed

NOTE:
The **Delete** button becomes active allowing you to delete what you have applied.

6. Click **Close**.

   Result: You exit the **007** linking field dialog box.

Bibliographic 008 Fixed Field

The **008** is a header in the main record used to describe the main format in the **Leader**. The **008** is required and non-repeatable.

The Bibliographic **008** field displays as a grid which is completely configurable using Voyager's MARC tag tables. See MARC Tag Tables on page A-1 for details on the MARC tag tables.

The procedure for editing the **008** field on the **MARC** tab is shown in Procedure 2-4, Editing the 008 Field, on page 2-12.

Procedure 2-4. Editing the 008 Field

Use the following to edit the **008** field on the **MARC** tab of an open bibliographic record.

1. Click the **008** button (see Figure 2-11) from the **MARC** tab of an open bibliographic record.

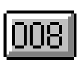

Figure 2-11. 008 Button

Result: The **008** field displays a grid-style dialog box (see Figure 2-12) with various drop-down menus and text boxes.

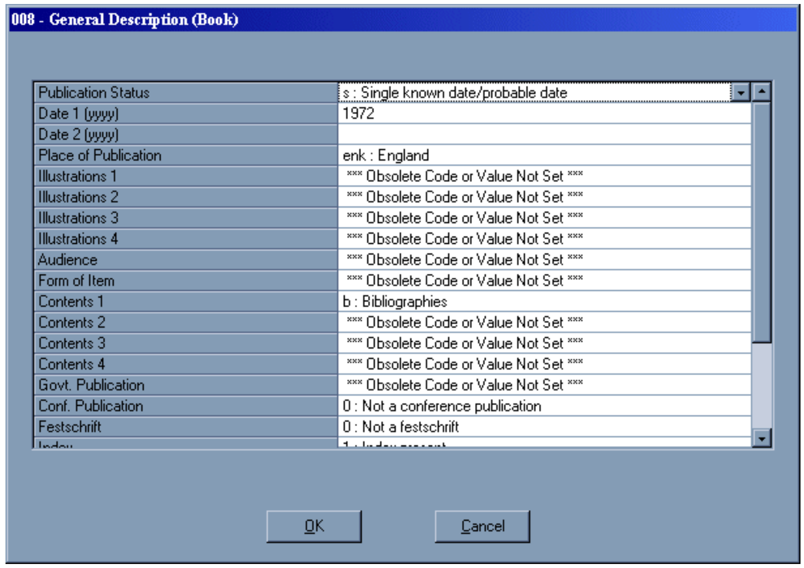

Figure 2-12. 008 - General Description dialog box

2. Enter the required information in the **008** dialog box.

   These fields accept ASCII characters. See MARC Tag Tables on page A-1 for more information.

   Use either the mouse or the up/down arrow keys on your keyboard to move from cell to cell within the grid or from option to option in the drop-down lists. The **Tab** key is not available for use within the grid. Using the **Tab** key takes you outside the grid altogether.

   Result: The required information is identified for the **008** field.

NOTE:
The date information must be 4 characters long. The first character must be a digit greater than zero followed by another digit or the characters **u**, **x**, **y**, or a question mark (**?**).

TIP:
*You can also enter the letter or number that precedes an option in a drop-down list to make a selection. For instance, if you want to jump from subfield **t** within the drop-down list to subfield **b**, simply press the letter **b**.*

3. Click **OK** or **Cancel**.

   Result: This saves your work and exits the **008** dialog box or exits the dialog box without saving.

Variable Fields

The variable fields grid allows you to add tags with first and second indicators and bibliographic data (subfields). The grid is made up of rows which store information about each tag. Each row is broken into segments for the tag, two indicators and the variable subfield text. When you create a bibliographic record, a grid template is supplied by the system and provides the required title statement (**245** tag) row. See Figure 2-13.

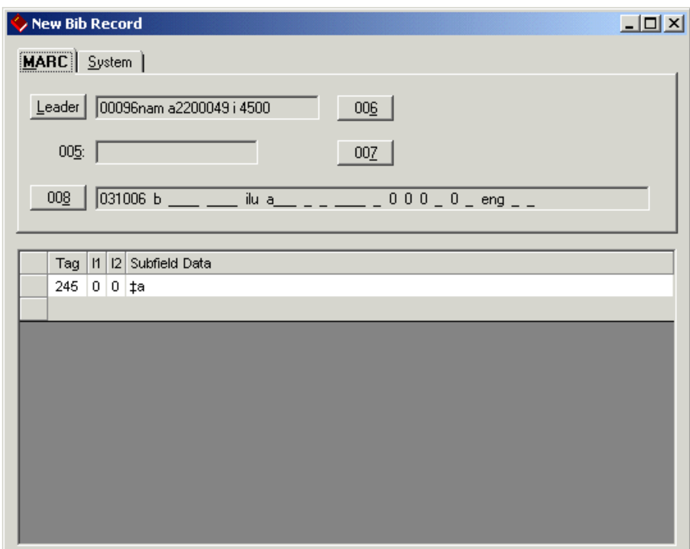

Figure 2-13. Variable fields grid with 245 tag row

880 Fields and Unicode Implementation

Voyager supports the creation and editing of bibliographic **880** (Alternate Graphic Representations) fields in Cataloging.

For more information about the support of non-Roman characters and Unicode, see Chapter 6, Diacritics and Non-Roman Characters on page 6-1 and Appendix C, Voyager with Unicode Considerations on page C-1.

Adding and Editing Variable Fields

There are several features that are common to adding and editing variable fields. Right click the selection column (containing the row marker) of the grid on the **MARC** tab to display the following input and editing options. See Figure 2-14 and Figure 2-15.

- Cut this field
- Copy this field
- Paste before this field
- Move this field up by one (moves the focus row up by one row)
- Move this field down by one (moves the focus row down by one row)
- Delete this field
- Validate heading in the field

This menu dynamically changes for the conditions of each row. Only the active options display.

NOTE:
These menu options only apply to the row that you clicked. When more than one row is selected, use the menu bar options for cut, copy, or delete.

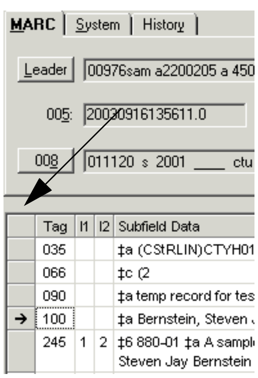

Figure 2-14. Selection Column

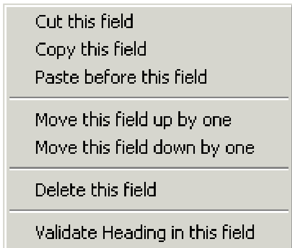

Figure 2-15. Editing options

The procedure for adding and editing variable fields is shown in Procedure 2-5, Adding and Editing Variable Fields, on page 2-16.

Procedure 2-5. Adding and Editing Variable Fields

Use the following to add and edit variable fields.

1. Click **Record>New>Bibliographic** and select a bibliographic template. See the example in Figure 2-16.

   Result: The **MARC** tab of a new bibliographic record displays with the leaders and variable fields grid.

2. Click the **Subfield Data** cell to enter the ‡a information for the 245 tag.

   Result: The content for ‡a is entered.

NOTE:
When you enter non-Roman characters for a language that is read right to left, the system dynamically adjusts for each subfield affected to flow the text in the proper direction. The Left / Right arrows on the keyboard adapt for movement through the text that is read right to left.

IMPORTANT:
Hebrew and/or Arabic language support needs to be installed in the operating system for them to display in the correct order.

NOTE:
Backspacing to erase diacritic characters may require you to press the backspace key twice. Diacritc characters are usually stored in the system as two separate components, the alphabetic character first and then the diacritic character. See Diacritics and Non-Roman Characters on page 6-1 and Voyager with Unicode Considerations on page C-1 for more information.

3. Click **Edit>Insert Field Before** (**F3**) or **Edit>Insert Field After** (**F4**) to add a tag to the grid.

   Result: This inserts a field before or after the current row.

4. Click the **Tag** cell and enter a tag number or press **F2** to select a valid tag from the **Valid Values** dialog box.

   Result: The tag displays in the cell.

5. Click the indicator cell and type the indicator number or press **F2** to select a valid indicator from the **Valid Values** dialog box.

   Result: A number representing the indicator displays in the indicator cell.

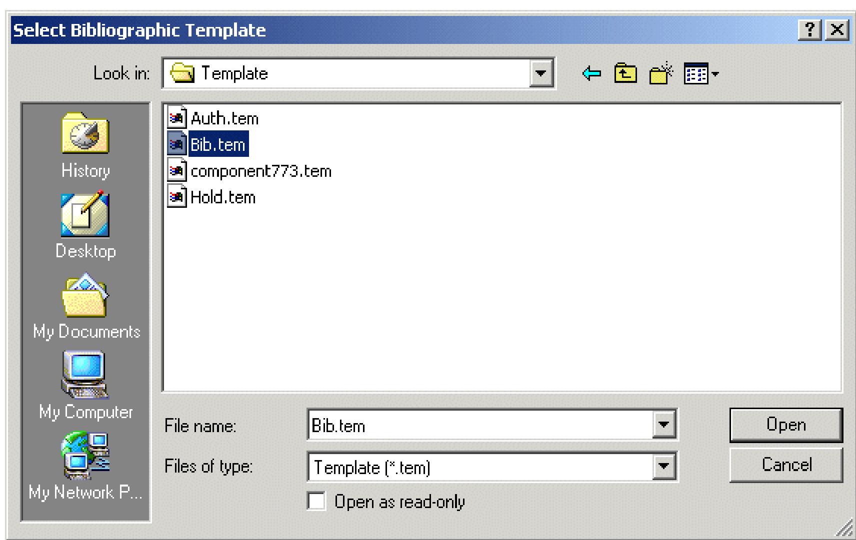

Figure 2-16. Bibliographic template selection

6. Click the bibliographic data cell labeled **Subfield Data** and press **F9**.

Result: This inserts a subfield delimiter in the **Subfield Data** cell.

NOTE:
The subfield delimiter may be automatically entered depending on the settings in your Session Defaults and Preferences (**General** tab). See Chapter 10, General Tab on page 10-2.

7. Type the subfield or press F2 to select a valid subfield.

   Result: A valid subfield is entered.

8. Enter the subfield data.

   Result: The bibliographic data is entered.

9. Click **Save to DB**.

   Result: This stores the bibliographic record in the Voyager database.

NOTE:
In an **010** field, the leading signification spaces are not trimmed. To accurately have three-leading spaces in an **010** field, you need four spaces between the subfield marker and the first digit of the LCCN. The space immediately after the subfield is added and removed by the Voyager Cataloging client to be consistent in its display of data.

Deleting Variable Fields

Use the Delete key to delete a row of variable information or individual characters within a row.

Entire Row

The procedure for deleting a row of variable field information is shown in Procedure 2-6, Deleting Row of Variable Field Information, on page 2-18.

Procedure 2-6. Deleting Row of Variable Field Information

Use the following to delete an entire row of variable field information.

1. Click the cell in the Selection Column (see Figure 2-14) next to the row you want to delete.

Result: This identifies via highlighting the material to be deleted.

2. Press the **Delete** key (or click **Edit>Delete Field** or right-click and select **Delete this field**) .

   Result: The system displays a warning dialog box.

3. Click **Yes** or **No**.

   Result: Selecting Yes deletes the highlighted material or selecting No cancels the delete request.

4. Click **Save to DB**.

   Result: This updates the record in the database with the deletion.

Individual Characters

The procedure for deleting a row of variable field information is shown in Procedure 2-6, Deleting Row of Variable Field Information, on page 2-18.

Procedure 2-7. Deleting Characters of Variable Field Information

Use the following to delete one or more characters of variable field information.

1. Click next to the character you want to delete.

   Result: The insertion point is positioned to the left of the character you want to delete.

2. Press the Delete key.

   Result: This deletes one character at a time of variable information.

3. Click **Save to DB**.

   Result: This updates the record in the database with the deletions.

Displaying Attachments, 856 Links, and Tables of Contents in WebVoyáge

Voyager's WebVoyáge module allows your institution to define what displays from your bibliographic, holdings, and item records. In addition, certain information can also be added to your bibliographic or holdings records which can be displayed in a special manner in WebVoyáge. Specifically, you can define attachments for patrons to view in WebVoyáge, links to linked resources, and Tables of Contents for bibliographic records.

Attachments

To specify that certain documents, images, World Wide Web pages, or other resources are available in the WebVoyáge OPAC when a specific record is selected, you must define the **856** field in a bibliographic record according to the MARC 21 standard.

In order for thumbnail images to display in WebVoyáge for a particular link, you must have a separate **856** field that refers to an image file that displays before any of the other **856** fields in the MARC record. The only types of links that may cause thumbnails to display are links to server files, scandoc links, and HTTP links.

A file only has a **unique** thumbnail image display in OPAC if it is a still image file such as a `.gif` file, a `.bmp` file, or a scandoc document which is a still image. If the link leads to a `.AVI`, `.MOV`, `.MPG`, `.PDF`, `.TXT`, or `.WAV` file, or to a URL link, a generic thumbnail is supplied. See the *Voyager WebVoyáge User's Guide* for more information.

856 Field Links

To include a World Wide Web or other linked resource in a bibliographic record, use the **856** field with the following subfields.

‡u The Universal Resource Locator (URL)

The following is an example of **856** fields in a MARC record specifying URLs.

```
856  _ _ ‡u http://www.akc.org
856  4 _ ‡u http://www.whitehouse.gov
856  7 _ ‡3 Table of Contents ‡2 HTTP ‡u http://
lcweb.loc.gov/cardir/toc/
```

The subfield 2 and string HTTP indicates that the link is an HTTP-type link when thumbnails are generated in OPAC. If this is used, the URL thumbnail image displays in OPAC in the thumbnails column. The **856** containing the thumbnail must be the first **856** field listed in the MARC record.

‡z Public Note

The following is an example of **856** fields in a MARC record specifying public notes.

```
856  4 _ ‡u http://www.akc.org ‡z The American Kennel
Club Web page
```

```
856  4 _ ‡u http://www.whitehouse.gov ‡z the White
House Web page
```

This example causes the following to display in WebVoyáge.

```
The American Kennel Club Web page
```

```
The White House Web page
```

NOTE:
This example displays as active links to the URLs specified in ‡u.

‡3 Materials Specified

The following is an example of an **856** field in a MARC record specifying a Table of Contents.

```
856  7 _ ‡3 Table of Contents ‡2 HTTP ‡u http://
lcweb.loc.gov/cardir/toc/
```

This example causes the following to display in WebVoyáge.

```
Table of Contents
```

NOTE:
This example displays as an active link to the bibliographic item's Table of Contents. If the **856** contains only a ‡u, then the URL displays as a link in the OPAC.

Images on a Server

If you want to link to files stored on a server, you can use ‡d, ‡f, and ‡o. ‡o may contain the literals UNIX or DOS® identifying the type of server to which the link points.

The following is an example of a MARC record **856** field specifying a link to an image on a server.

```
856   _ _ ‡d c:\word\winword ‡f schedule.doc ‡o dos
‡z 1995 Fall Class Schedule
```

NOTE:
When a record displays with a link to an image on a server, a thumbnail displays in the Titles Index in WebVoyáge.

Image Server Links

If your library uses Image Server, and you want to specify a link to images stored in the Image Server database, 7 is the first indicator in the **856** field as in the following example.

```
856   7_ ‡2 sdc ‡f 10, 10, 4 ‡z public note
```

NOTE:
When a record with an Image Server link displays in the Title Index in WebVoyáge, a thumbnail displays.

Image Server adds a link to both existing bibliographic records and existing holdings records. The **856** is created automatically with a value of 7 in the first indicator. ‡2, ‡f, and ‡z are also filled in during the creation.

‡g DOI and URN Links

If you want to link to a DOI or URN, you can use ‡g, as in the following example.

```
856   _ _ ‡g DOI:87955754 ‡z DOI link to somewhere
```

For information about what needs to be set up in order for DOI or URN links to be successful in OPAC, see the *Voyager WebVoyáge User's Guide*.

Verifying 856 Links

You can verify the integrity of **856** links in the current bibliographic or holdings record by selecting **Record>Verify 856 links** from the Cataloging main menu, or by using the **Ctrl** + **K** keystroke. This opens the **856 Links** dialog box. See Figure 2-17.

NOTE:
If the record does not have any **856** links, an error message displays to that effect. See Table 2-2.

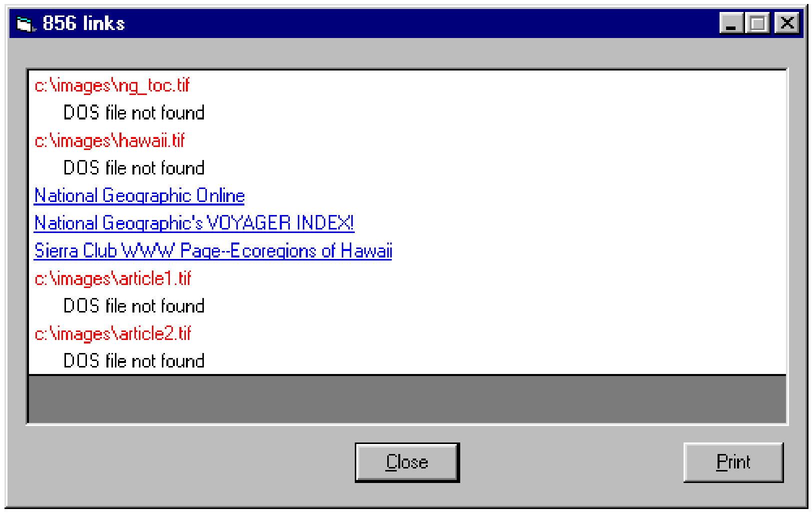

Figure 2-17. 856 Links dialog box

Table 2-2. Link Status

Link Status	Description
Valid Links	Display underlined and in blue.
Invalid Links	Display in red with a diagnostic message. Invalid links can be corrected by editing the **856** field in the MARC record. Clicking a valid link (blue and under-lined initiates that connection.

Voyager handles three types of links. See Table 2-3.

- URL (including URN and DOI)
- Images on a server
- DOS

Table 2-3. Link Type

Link Type	Description
URL Links	If you click a **URL** link, it will launch the Web browser and display the specified file. In order for **DOI** and **URN** links to be verified, the addresses of the **DOI** and **URN** handler servers must be entered in the DOI and URN fields on the **Validation** tab of the **Session Defaults and Preferences** window. See 10-8 for more information about **DOI** and **URN 856** links.
Links to Images on a Server	Use either Image Server or a Web browser as determined by the name specified on the **Validation** tab in Cataloging's Session Defaults and Preferences.
DOS Links	DOS network files are determined by the operating system specified in the MARC record **856** field.

Table of Contents

To display a formatted Table of Contents in the OPAC, you must define the **505** field in the bibliographic record. The OPAC displays the information stored in subfield **‡a** and formats the information in one line that wraps to fit each screen and starts a new line at each double dash.

System Tab

Press **Alt + S** from an open bibligraphic record to switch to the **System** tab.

The **System** tab contains the options to approve records for export and to suppress records from OPAC. In addition, the Owning Library for the record displays. See Figure 2-18. All the information relating to **OK to export** is located on the **System** tab, including whether or not the record is OK to be exported (**YES**/**NO**), the date on which the **OK to export** option should take effect, the date on which the **OK to export** option was last set, the operator who set the record as **OK to export**, and the location at which **OK to export** was set.

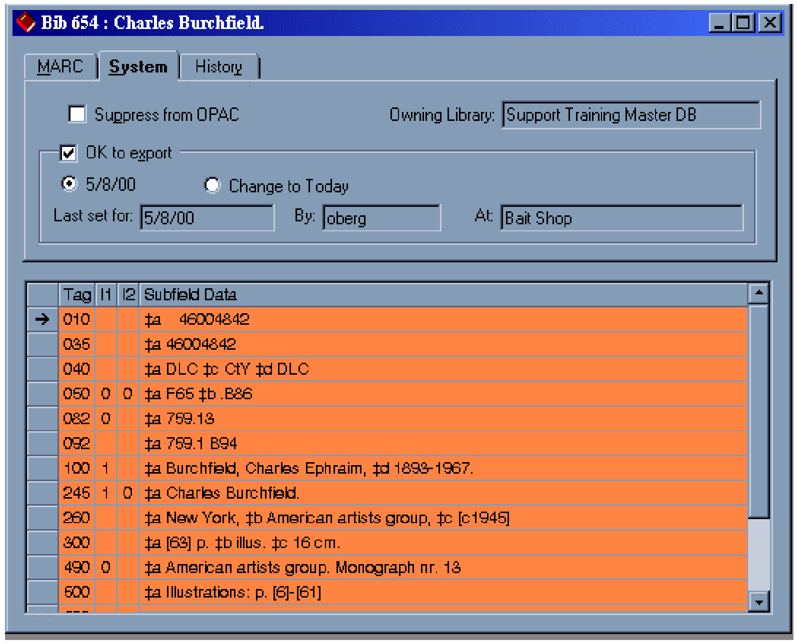

Figure 2-18. Bibliographic Record - System Tab

OK to Export Option

The **OK to export** option is used by libraries that export records. For instance, you may export records to a bibliographic utility on a regular basis to have holdings records attached. You can use Voyager's Pmarcexport program to export records. See the *Voyager Technical User's Guide* for details.

Checking the **OK to export** box confirms that the bibliographic record is acceptable for export. You must click the **Save to Database** button for it to take effect. If the **OK to export** box already contains a check mark, that indicates that an operator has either approved the record for export at an earlier date, or the record was automatically authorized for export when it was imported. To automatically mark records as **OK to export**, see the "Bulk Export of MARC Records" section of the *Voyager Technical User's Guide*.

When the **OK to export** box is checked, two radio buttons become active on the **System** tab, allowing you to either select the last date on which the **OK to export** option was set, or to select today's date (**Change to Today** radio button). Selecting the **Change to Today** radio button and then clicking the **Save to Database** button will cause the **OK to export** date to change to today's date.

NOTE:
The **OK to export** option resets during the actual export process. The date, operator, and location at which the **OK to export** option was last set display below the **OK to export** check box and the two radio buttons indicating export dates, in the **Last set for**, **By**, and **At** textboxes.

Suppress from OPAC Option

To prevent a bibliographic record from displaying in the OPAC module, mark the check box labeled **Suppress from OPAC** (or press **Alt + P**). This also prevents any information about attached holdings and item records from displaying in the OPAC. However, if the **Suppress from OPAC** check box for a location is checked in the System Administration module, you cannot uncheck the **Suppress from OPAC** check box in Cataloging. See the *Voyager System Administration User's Guide* for details.

TIP:
*When the **Suppress from OPAC** box is checked, the small book icon in the top left corner of the record is greyed. When the check box is unchecked, the icon displays in a reddish-burgundy shade. This gives you a visual indication of the status of that record.*

History Tab

Press **Alt + Y** from an open bibliographic record to switch to the **History** tab.

The **History** tab includes a list of every change ever made to a bibliographic record (see Figure 2-19). These changes are described in Table 2-4.

Table 2-4. History Tab Field Descriptions

Field Name	Description
Date/Time	The date and the time the change was made.
Operator	The operator who made the change (actually the operator name as assigned in System Administration).
Cataloging Location	The happening location (as defined in System Administration) at which the change was made.
Action	The action performed on the record (UPDATE, CREATE, MERGE, REPLACE, or RELINK).
Encoding Level	The encoding level as set in the **Leader** field of the record.

Table 2-4. History Tab Field Descriptions

Field Name	Description
Suppress Action	Whether or not the Suppress from OPAC check box was checked on the **System** tab.

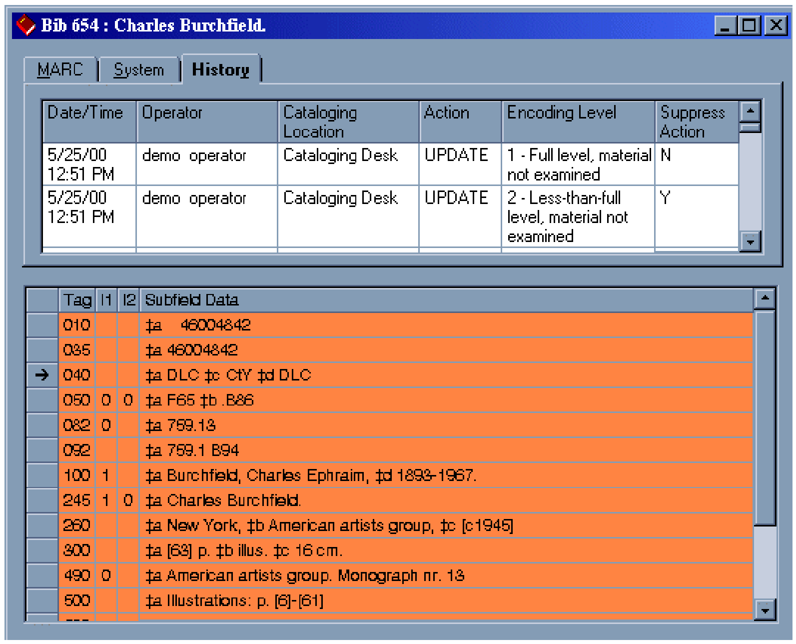

Figure 2-19. Bibliographic Record History Tab

Sorting the columns

You can sort the **History** tab columns in ascending or descending order by clicking the column header.

Lag Time

In cases where a record has undergone massive amounts of changes such as 1000 updates, you may find a small lag time when you click the **History** tab (or select **Alt + Y**). This is because the **History** tab is dynamically updated by your Voyager system. The lag time should not be more than a few seconds.

Viewing and Editing Line Items from Bibliographic Records

It is possible to view and then manipulate a line item in the Acquisitions module from the associated bibliographic or holdings record in the Cataloging module. This feature is known as Acquisitions in Cataloging or Acq in the Cat.

Acq in the Cat is the second half of the two-way communication between the Acquisitions and Cataloging modules. See the *Voyager Acquisitions User's Guide* for details. Cat in the Acq allows you to view and then edit a MARC record in the Cataloging module from the associated line item in the Acquisitions module.

For details and instructions on using the Acq in the Cat feature, see Viewing and Editing Line Items (Acquisitions in Cataloging) on page 3-68.

Authority Records

An Authority Record is created when you select an authority template from the **Select Authority Template** dialog box (see Creating a Record on page 3-1) or when you click **Create** from the Authority Validation dialog (see Chapter 9, Introduction on page 9-1).

The authority record contains three tabs.

- MARC tab
- System tab
- History tab

When you create a new authority record, only the **MARC** and **System** tabs display since the record has no history yet.

MARC Tab

The **MARC** tab of an authority record (see Figure 2-20) contains a **Leader**, an **008** fixed field, and variable fields. All values correspond to the published MARC standard.

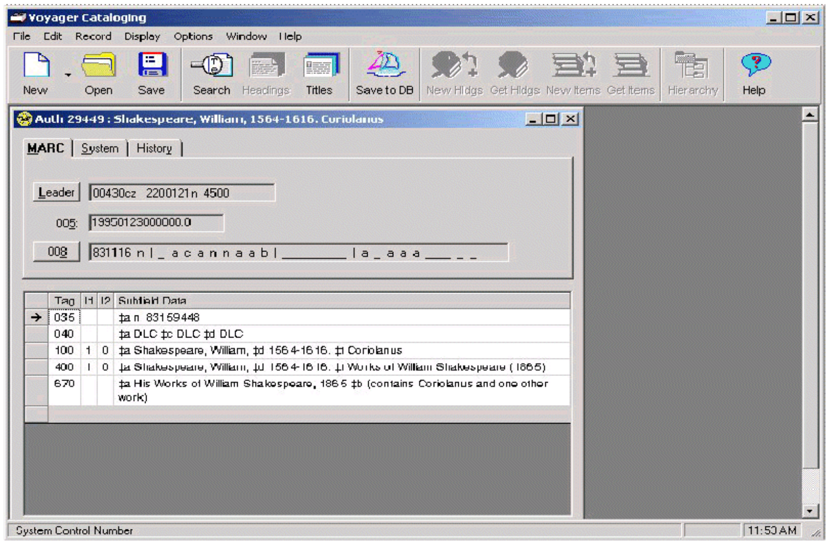

Figure 2-20. Authority record - MARC tab

Authority Leader

The Authority Leader Information allows you to select the Record Status and the Encoding Level. The Authority Type has only one type, so it always displays a “z.”

The **Authority Leader** field displays as a grid, which is completely configurable using Voyager’s MARC tag tables. See MARC Tag Tables on page A-1 for details on the MARC tag tables.

The procedure for configuring the Authority leader is shown in Procedure 2-8, Configuring the Authority Leader, on page 2-29.

Procedure 2-8. Configuring the Authority Leader

Use the following to configure the Authority leader.

1. Click the **Leader** button (see Figure 2-21) from an open Authority record.

Figure 2-21. Leader Button

Result: The **Leader** dialog box (see Figure 2-22) opens as a grid.

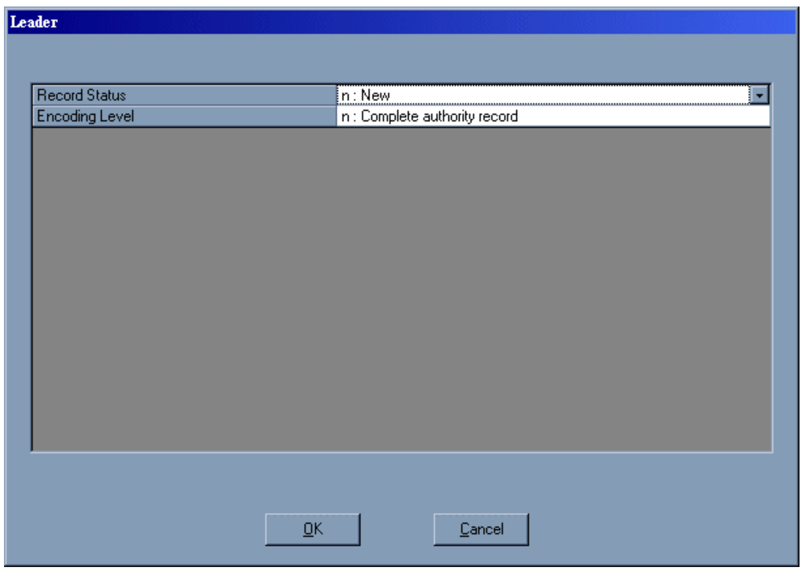

Figure 2-22. Leader dialog box for authority information

2. Choose a record status and an encoding level from the appropriate drop-down menus by clicking the cell and then the **down arrow** to display the drop-down menu selections.

   To display and browse drop-down menu selections, click the **down arrow** or press **F4** or the space bar. Use the **up** and **down arrows** on your keyboard to navigate within the drop-down menu. From within a drop-down menu, you can enter the letter or number that precedes a particular selection. For instance, if you want to jump from subfield **z** within the drop-down menu to subfield **a**, you can simply press the letter **a**.

3. Click **OK** to exit and save your work; click **Cancel** or **Esc** to exit without saving.

Authority 008 Fixed Field

The **008** is a header in the main record used to describe the main format in the **Leader**. The **008** is required and non repeatable.

The Authority **008** field displays as a grid which is completely configurable using Voyager's MARC tag tables. See MARC Tag Tables on page A-1 for details on the MARC tag tables.

The procedure for configuring the Authority 008 Field is shown in Procedure 2-9, Configuring the Authority 008 Field, on page 2-31.

Procedure 2-9. Configuring the Authority 008 Field

Use the following to configure the Authority **008** field.

1. Click the **008** button (see Figure 2-23) from an open authority record.

Figure 2-23. 008 Button

Result: The **008 - General Description (Authority)** dialog box (see Figure 2-24) opens as a grid.

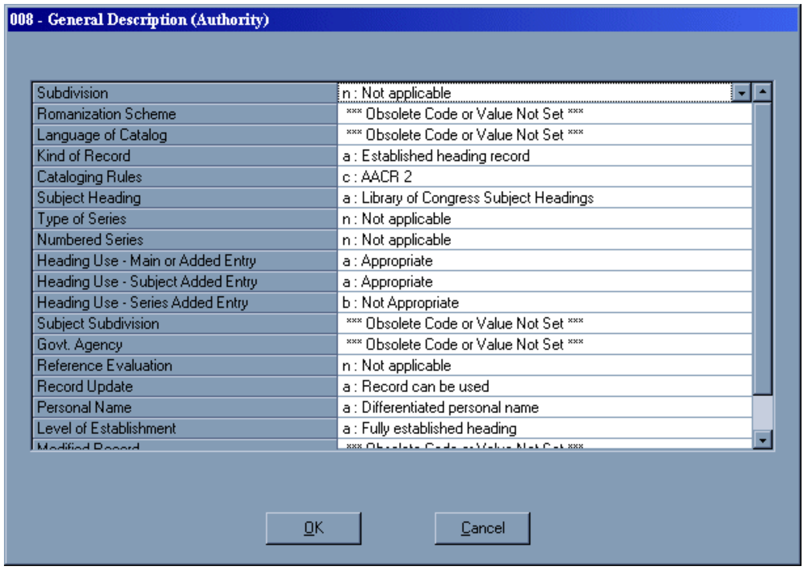

Figure 2-24. 008 - General Description (Authority) dialog box

2. Select values from the grid by clicking a particular cell and then the **down arrow** to display drop-down menu selections.

   You must use either the mouse or the **up** and **down arrows** on your keyboard to move from cell to cell within the grid. To use the latter, first click in a particular cell and then use the **up** and **down arrows** to navigate from cell to cell. Do not click the **down arrow**. This causes you to browse the selections within a particular drop-down menu. Note that you cannot use the **Tab** key to move from cell to cell on the grid. This takes you outside the grid altogether.

   To display and browse drop-down menu selections, click the **down arrow** or press **F4** or the space bar. Use the **up** and **down arrows** on your keyboard to navigate within the drop-down menu. From within a drop-down menu, you can enter the letter or number that precedes a particular selection. For instance, if you want to jump from subfield **z** within the drop-down menu to subfield **a**, you can simply press the letter **a**.

   NOTE:
   In the **008** dialog box, the Heading Use selections are made via drop-down menus.

3. Once you make selections, click **OK** to exit and save your work; click **Cancel** or **Esc** to exit without saving.

Variable Fields

The Variable Fields grid allows you to add Tags, with First and Second Indicators, and Subfield Data.

In order to add or edit information in the Variable Fields grid, you must first place your cursor in that grid. To do this, position and click your mouse in the Variable Fields portion of the record.

The procedure for adding a tag to the grid is shown in Procedure 2-10, Adding a Tag to the Grid, on page 2-33.

Procedure 2-10. Adding a Tag to the Grid

Use the following to add a tag to the grid.

1. Select **Edit>Insert Field Before** (**F3**), or **Edit>Insert Field After** (**F4**).
2. Select the Tag cell by clicking in the cell under Tag heading. Type the tag or press **F2** to select a valid tag from the Cataloging Tips scroll box. The tag displays in the cell.
3. Select an indicator by clicking in the indicator cell. Type the indicator or press **F2** to select a valid indicator from the Cataloging Tips scroll box. A number representing the indicator displays in the indicator cell.
4. Select the Subfield Data cell. Press **F9** to insert a subfield delimiter in the cell. Type the subfield or press **F2** to select a valid subfield from the Cataloging Tips scroll box. Enter the subfield data. If necessary, click the ellipse box to expand the data cell.

The procedure for deleting a tag is shown in Procedure 2-11, Deleting a Tag, on page 2-33.

Procedure 2-11. Deleting a Tag

Use the following to delete a tag.

1. Click the row label (the grey, left column).
2. Press the **Delete** key on the keyboard.

3. Respond to the confirmation message.

System Tab

Pressing **Alt + S** from an open authority record will switch you to the **System** tab (see Figure 2-25).

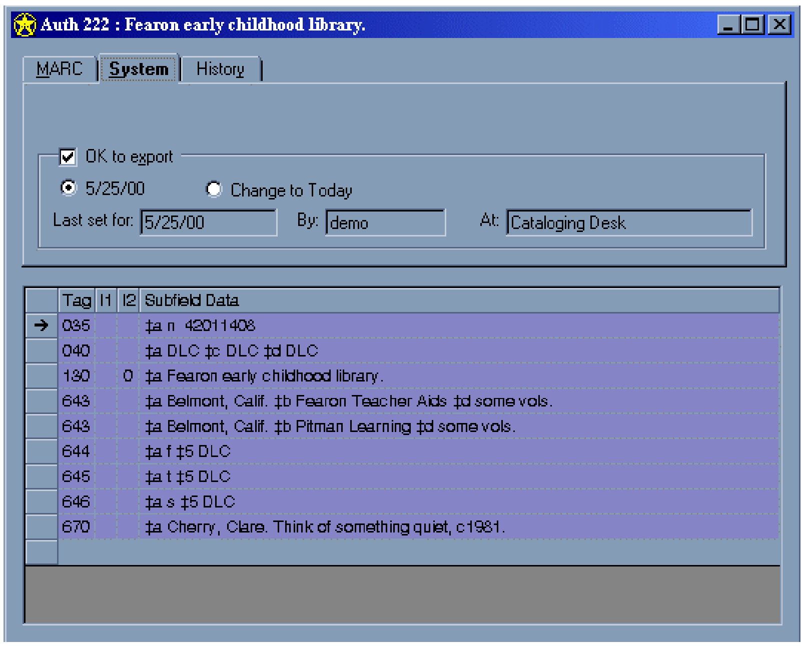

Figure 2-25. Authority Record : System Tab

The System tab contains the option to approve records for export. All the information relating to **OK to export** is located on the **System** tab, including whether or not the record is OK to be exported (**YES**/**NO**), the date on which **OK to export** should take effect, the date on which **OK to export** was last set, the operator who set the record as **OK to export**, and the location at which **OK to export** was set.

OK to Export Option

The **OK to export** check box is for libraries that export records. You can confirm that the record is acceptable for export by checking the box. You must click the **Save to Database** button for changes to take effect. If the **OK to export** box is already checked, that indicates that an operator has either approved the record for export at an earlier date, or the record was *automatically* authorized for export when it was imported it. To *automatically* mark records as **OK to export**, see the "Bulk Export of MARC Records" section of the *Voyager Technical User's Guide*.

When the **OK to export** box is checked, two radio buttons become active on the **System** tab, allowing you to either select the last date on which the **OK to export** option was set, or to select today's date (**Change to Today** radio button). If you select **Change to Today** and then click the **Save to Database** button, the **OK to export** date will change to today's date.

NOTE:
The **OK to export** option resets during the actual export process. The date, operator, and location at which the **OK to export** option was last set display below the **OK to export** check box and the two radio buttons indicating export dates, in the **Last set for**, **By**, and **At** textboxes.

History Tab

Press **Alt + Y** from an open authority record to switch to the **History** tab.

The **History** tab includes a list of every change ever made to an authority record (see Figure 2-26). These changes are described in Table 2-5.

Table 2-5. History Tab Field Descriptions

Field Name	Description
Date/Time	The date and the time the change was made.
Operator	The operator who made the change (actually the operator name as assigned in System Administration).
Cataloging Location	The happening location (as defined in System Administration) at which the change was made.
Action	The action performed on the record (UPDATE, CREATE, MERGE, REPLACE, or RELINK).
Encoding Level	The encoding level as set in the **Leader** field of the record.
Suppress Action	Whether or not the Suppress from OPAC check box was checked on the **System** tab.

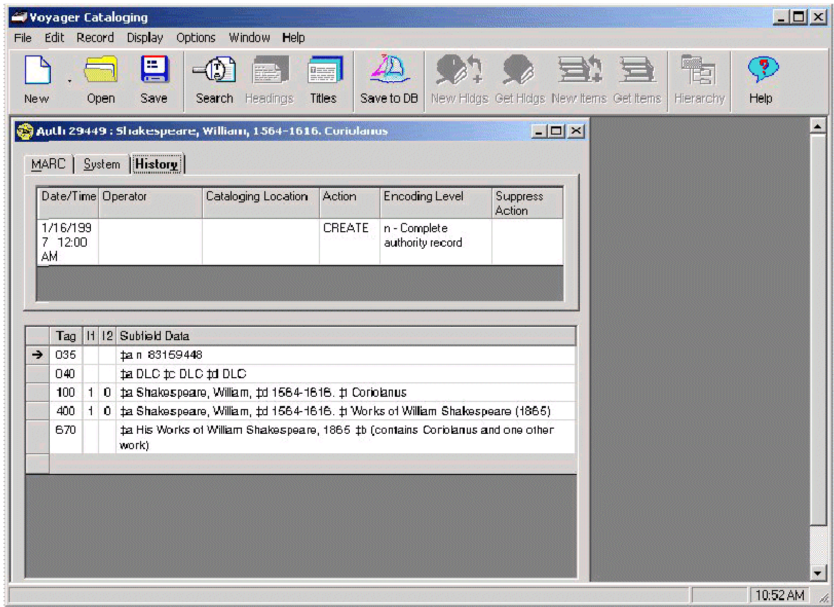

Figure 2-26. Authority Record History Tab

Sorting the columns

You can sort each of the **History** tab columns in ascending or descending order by clicking the column header.

Lag Time

In cases where a record has undergone massive amounts of changes such as 1000, you may find a small lag time when you click the **History** tab (or select **Alt + Y**). This is because the **History** tab is dynamically updated by your Voyager system each time you click it. The lag time should not be more than a few seconds.

Holdings Records

Holdings Records (MFHDs) contain all the holdings information for bibliographic records. A holdings record can be created by selecting **Record>Create Holdings**, or by clicking the **Create Holdings** button when a bibliographic record is the active record. Before you can save a holdings record to the database, you must define field **852** subfield **b** with a valid location code (as defined in System Administration).

MARC Tab

The Holdings Record window (see Figure 2-27) consists of four tabs.

- MARC tab
- System tab
- Bib Title(s) tab
- History tab

The **MARC** tab of a holdings record contains a **Leader**, an **008** fixed field, and variable fields. It also contains only one **007** fixed field. All values correspond to the published MARC standard.

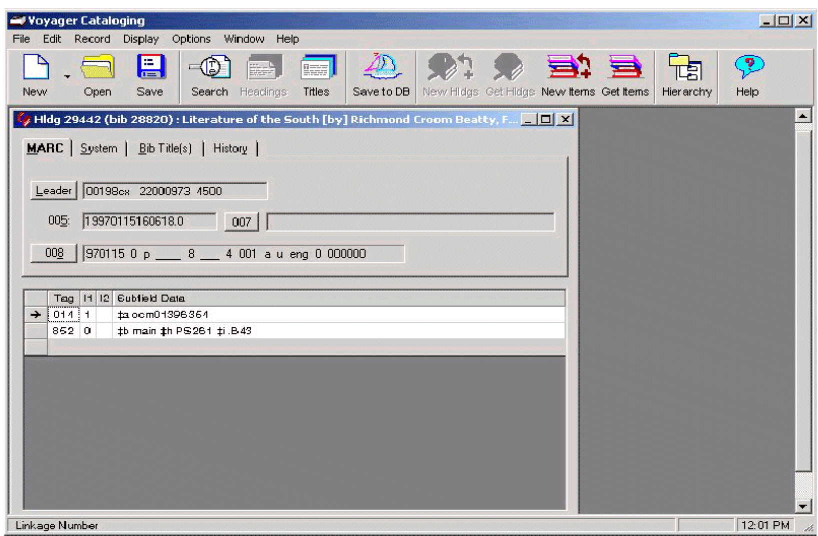

Figure 2-27. Holdings Record - MARC Tab

Once a holdings record is saved to the database (see Saving a Record on page 4-5) the title of the associated bibliographic record is displayed on the title bar of the holdings record, and on the **BibTitle(s)** tab.

Holdings Leader

The **Holdings Leader** field allows you to select the **Record Status**, **Type of Record**, and **Encoding Level**.

The **Holdings Leader** field displays as a grid which is completely configurable using Voyager's MARC tag tables. See MARC Tag Tables on page A-1 for details on the MARC tag tables.

The procedure for configuring the holdings leader is shown in Procedure 2-12, Configuring the Holdings Leader, on page 2-38.

Procedure 2-12. Configuring the Holdings Leader

Use the following to configure the holdings leader.

1. Click the **Leader** button from the **MARC** tab of an open holdings record. The **Leader** dialog box (see Figure 2-28) for holdings information displays as a grid.

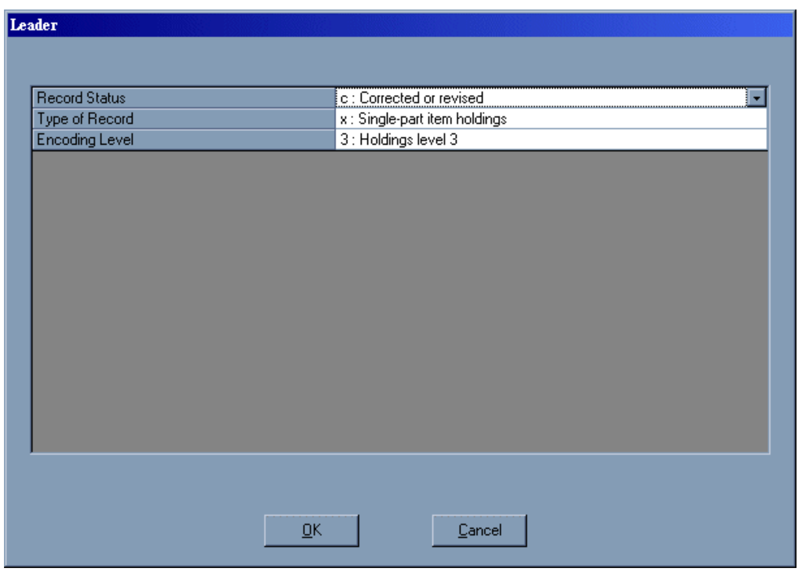

Figure 2-28. Leader dialog box for holdings information

2. Select values from the grid by clicking a particular cell and then the **down arrow** to display drop-down menu selections.

You must use either the mouse or the **up** and **down arrows** on your keyboard to move from cell to cell within the grid. To use the latter, first click in a particular cell and then use the **up** and **down arrows** to navigate from cell to cell. Do not click the **down arrow**. This causes you to browse the selections within a particular drop-down menu. Note that you cannot use the **Tab** key to move from cell to cell on the grid. This takes you outside the grid altogether.

To display and browse drop-down menu selections, click the **down arrow** or press **F4** or the space bar. Use the **up** and **down arrows** on your keyboard to navigate within the drop-down menu. From within a drop-down menu, you can enter the letter or number that precedes a particular selection. For instance, if you want to jump from subfield **z** within the drop-down menu to subfield **a**, you can simply press the letter **a**.

3. Click **OK** to exit and save your work; click **Cancel** or **Esc** to exit without saving.

Holdings 007 Fixed Field

The **007** field is a non-repeatable field that allows you to define a material category.

The Holdings **007** field displays as a grid which is completely configurable using Voyager's MARC tag tables. See MARC Tag Tables on page A-1 for details on the MARC tag tables.

The procedure for configuring the holdings **007** fixed field is shown in Procedure 2-13, Configuring the Holdings 007 Fixed Field, on page 2-39.

Procedure 2-13. Configuring the Holdings 007 Fixed Field

Use the following to configure the holdings **007** fixed field.

1. Click the **007** button (see Figure 2-29) from the **MARC** tab of an open holdings record.

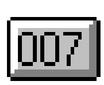

Figure 2-29. 007 Button

Result: The **007** field displays a tabbed dialog box (see Figure 2-30).

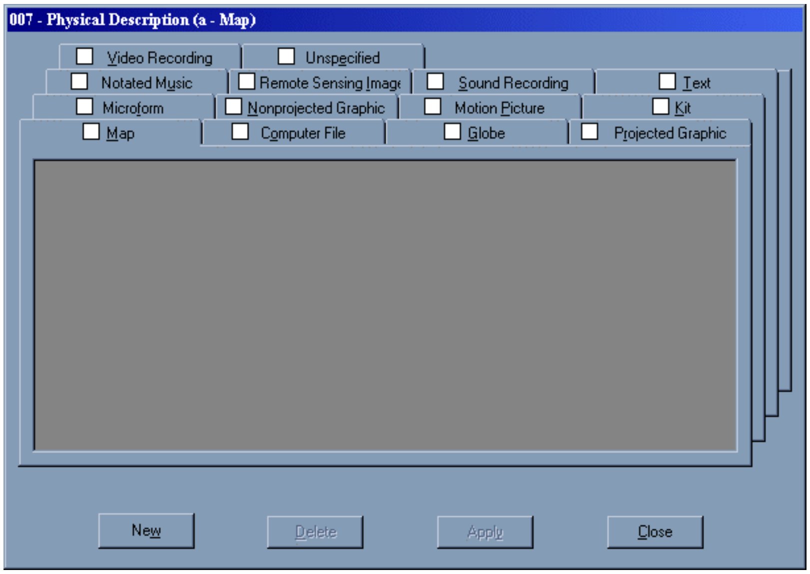

Figure 2-30. 007 - Physical Description dialog box for holdings information

2. Select a tab on which you want to enter values.

NOTE:
You can use keyboard shortcuts to access tabs without the use of the mouse by holding down the **Alt** key and the key that is underlined on the tab name. For example, from the **007** dialog box in Figure 2-31, you can use the **Alt+m** keystroke to access the **Maps** tab without using the mouse. See MARC Tag Tables on page A-1 for details on how to define your own keyboard access keys.

3. Click the **New** button at the bottom of the dialog box to add a category. A grid displays with various drop-down menus (Figure 2-31). Select values from the grid by clicking a particular cell, and then the **down arrow** to display drop-down menu selections.

   After you make your selections, click **Apply**. Notice that a check displays in the check box indicating that values have been selected for that tab such as in Figure 2-31 values have been added and applied on the **Map** tab).

   You must use either the mouse or the **up** and **down arrows** on your keyboard to move from cell to cell within the grid. To use the latter, first click in a particular cell and then use the **up** and **down arrows** to navigate from cell to cell. Do not click the **down arrow**. This causes you to browse the selections within a particular drop-down menu. Note that you cannot use the **Tab** key to move from cell to cell on the grid. This takes you outside the grid altogether.

To display and browse drop-down menu selections, click the **down arrow** or press **F4** or the space bar. Use the **up** and **down arrows** on your keyboard to navigate within the drop-down menu. From within a drop-down menu, you can enter the letter or number that precedes a particular selection. For instance, if you want to jump from subfield **z** within the drop-down menu to subfield **a**, you can simply press the letter **a**.

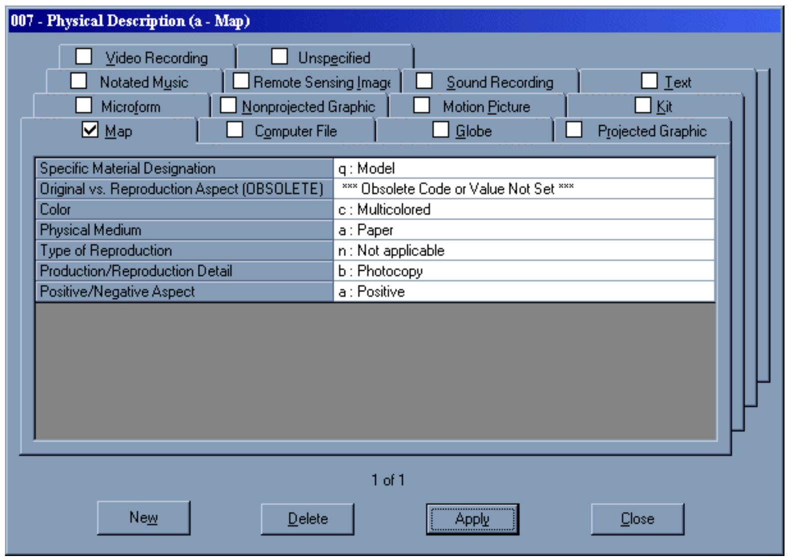

Figure 2-31. 007 - Physical Description dialog with grid displayed

NOTE:
Provided you have entered and applied values for the tab, you do not have to click the **New** button the next time you select that particular tab. Rather, the tab displays in grid format with the values you selected.

4. Update a category: Complete the fields and click the **Apply** button. This will make the change(s) to the current display.

5. Delete a category: Click the **Delete** button.

6. Exit the **007** Field display: Click the **Close** or **Esc** buttons. Any changes you have made will not be saved unless the **Apply** or **Delete** buttons were clicked.

Holdings 008 Fixed Field

The **008** is a header in the main record used to describe the main format in the **Leader**. The **008** is required and nonrepeatable.

The Holdings **008** field displays as a grid which is completely configurable using Voyager’s MARC tag tables. See MARC Tag Tables on page A-1 for details on the MARC tag tables.

The procedure for configuring the holdings 008 fixed field is shown in Procedure 2-14, Configuring the Holdings 008 Fixed Field, on page 2-42.

Procedure 2-14. Configuring the Holdings 008 Fixed Field

Use the following to configure the holdings **008** fixed field.

1. Click the **008** button (see Figure 2-32) from the **MARC** tab of an open holdings record.

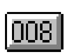

Figure 2-32. 008 Button

Result: The **008** dialog box (see Figure 2-33) opens in a grid format.

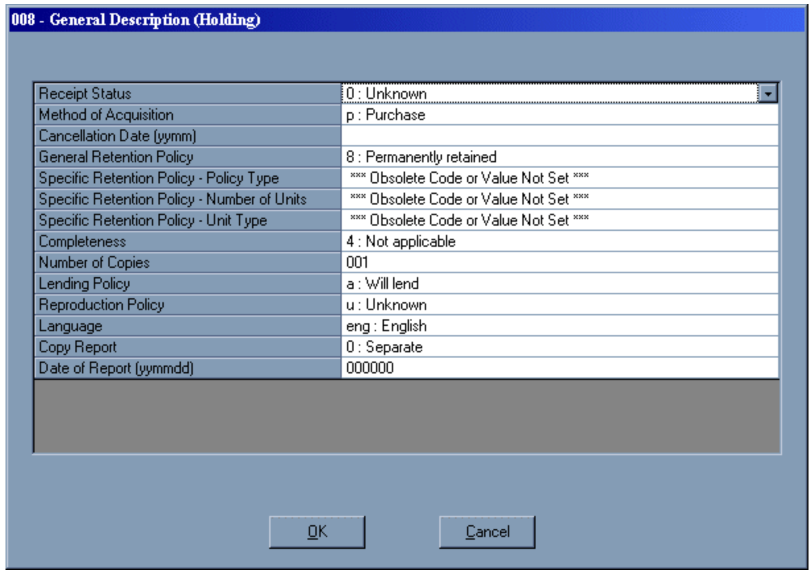

Figure 2-33. 008 - General Description (Holding) dialog box

2. In the Cancellation Date, Number of Copies, and Date of Report fields, enter values if applicable.

3. Select other values from the grid by clicking a particular cell, and then the **down arrow** to display drop-down menu selections.

   You must use either the mouse or the **up** and **down arrows** on your keyboard to move from cell to cell within the grid. To use the latter, first click in a particular cell and then use the **up** and **down arrows** to navigate from cell to cell. Do not click the **down arrow**. This causes you to browse the selections within a particular drop-down menu. Note that you cannot use the **Tab** key to move from cell to cell on the grid. This takes you outside the grid altogether.

   To display and browse drop-down menu selections, click the **down arrow** or press **F4** or the space bar. Use the **up** and **down arrows** on your keyboard to navigate within the drop-down menu. From within a drop-down menu, you can enter the letter or number that precedes a particular selection. For instance, if you want to jump from subfield **z** within the drop-down menu to subfield **a**, you can simply press the letter **a**.

NOTE:
For a Holdings record created in the Cataloging module, the default Method of Acquisition is **u** (for unknown).

4. After you make your selections, click **OK** to exit and save your work; click **Cancel** or **Esc** to exit without saving.

Variable Fields

The Variable Fields grid allows you to add Tags (with First and Second Indicators), and Bibliographic Data (subfields). The system grid template provides the required Location/Call Number (**852** tag) row with the subfield **b** entered with the location specified in Session Defaults (see 10-1).

NOTE:
Voyager accepts Dewey call numbers that have more than one decimal point, as well as call numbers that only have a decimal point after the Dewey root/Cutter combination such as `D255.2F K88 v.3`; `B985 DUN.B`.

In order to add or edit in the Variable Fields grid, you must first place your cursor in that grid. To do this, position and click your mouse in the Variable Fields portion of the record.

The procedure for adding variable fields is shown in Procedure 2-15, Adding Variable Fields, on page 2-44.

Procedure 2-15. Adding Variable Fields

Use the following to add variable fields.

1. Select **Edit>Insert Field Before** (**F3**) or **Edit>Insert Field After** (**F4**) to add a tag to the grid.

2. Select the Tag cell by clicking in the cell under Tag heading. Type the tag or press **F2** to select a valid tag from the Cataloging Tips scroll box. The tag displays in the cell.

3. Select an indicator by clicking in the indicator cell. Type the indicator or press **F2** to select a valid indicator from the Cataloging Tips scroll box. A number representing the indicator displays in the indicator cell.

4. Select the Bibliographic Data cell. Press **F9** to insert a subfield delimiter in the cell. Enter the subfield or press **F2** to select a valid subfield from the Cataloging Tips scroll box. Enter the subfield data. If necessary, click the ellipse box to expand the data cell.

To delete a tag, click the row label (the grey, left column). Press the **Delete** key on the keyboard and respond to the confirmation message.

NOTE:
A function has been added to the Cataloging module allowing you to automatically add a bibliographic record call number **852 h** and **852 i** into a holdings record. This function is discussed in Get Call Number from Bib Record on page 2-45.

Get Call Number from Bib Record

The get call number from bib record function improves material processing by automatically adding a call number to an existing MFHD. This MFHD can either lack a call number or contain an existing call number that needs to be replaced.

Workflow Examples

Below are two instances in which the get call number from bib record function would be useful.

- The get call number from bib record function would be useful when a MFHD is created without a call number (e.g., in Acquisitions). Holdings records do not, as a rule, include a call number when they are created in Acquisitions. Usually, they contain only a location (**852|b** field).
- Get call number from bib record would also be useful when an existing MFHD has a call number that is being replaced. Perhaps your library is engaging in a retrospective conversion or a re-classification project in which call numbers are being reviewed and/or replaced.

In either of these instances, using the get call number from bib record function would simplify the insertion of the call number into the MFHD (**852|h** and **852|i** fields). Rather than having to type in the call number or copy and paste the call number from the MFHD's associated bibliographic record, the call number could be automatically inserted into the MFHD (via the appropriate menu option). This minimizes keystrokes and associated errors. It also eliminates the overall awkwardness of copying the call number from an open bib record and pasting it into the appropriate MFHD field.

NOTE:
If a bibliographic record contains multiple instances of call number information as specified in the call number hierarchy such as more than one **090 ‡a**, the system adds the last instance of the call number information, **090 ‡a**, to subfield **h** and subfield **i** of the MFHD.

Setting Up to Use Get Call Number from Bib Record

You must select a call number hierarchy in Cataloging's **Session Defaults and Preferences** in order to use get call number from bib record. The call number hierarchy indicates the type of call number such as LC or Dewey placed in the MFHD. For instance, if you want an LC call number to be placed in the MFHD, you would select the LC call number hierarchy. If you do not select a call number hierarchy in Cataloging's Session Defaults and Preferences, you are not able to use the get call number from bib record function.

IMPORTANT:
*The fields of the bibliographic record in which the system checks for call numbers such as **050**, **082**, **090**, and so on differ for each call number type. You must define these fields for each call number type in the System Administration module, and then select the call number type as part of the appropriate Cataloging Policy Group. See the Voyager System Administration User's Guide for details.*

The procedure for setting the call number hierarchy is shown in Procedure 2-16, Setting the Call Number Hierarchy, on page 2-46.

Procedure 2-16. Setting the Call Number Hierarchy

Use the following to set the call number hierarchy.

1. Select **Options>Preferences** from the Cataloging toolbar.

   Result: The **Session Defaults and Preferences** dialog box opens.

2. From the **General** tab, click the arrow at the far right of the **Call Number Hierarchies** drop-down menu.

   Result: A list with hierarchy names, codes, and call number classes displays (see Figure 2-34).

3. Select from the list the call number hierarchy you want to input in the MFHD, and click the **OK** button.

   Example: If you want to have an LC call number placed in the MFHD, select the LC call number hierarchy.

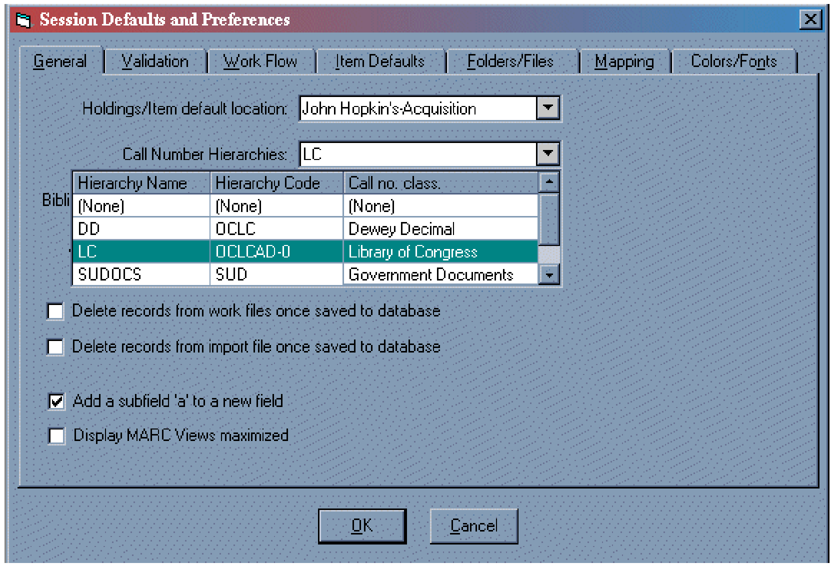

Figure 2-34. Selecting a call number hierarchy

NOTE:
Each call number hierarchy is associated with a holdings/item default location (defined in Voyager's System Administration module for the appropriate Cataloging Policy Definition to which the holdings/item default location belongs). If you select a call number hierarchy in Cataloging's **Session Defaults and Preferences** that is not associated with the specified holdings/item default location, you get a warning message (see Figure 2-35).

If you select **Yes**, the classification scheme for the call number hierarchy is changed in Cataloging. If you select **No**, the classification scheme for the call number hierarchy is not changed. You get the same message when you log into the Cataloging module if the hierarchy selected still does not match the holdings/item default location.

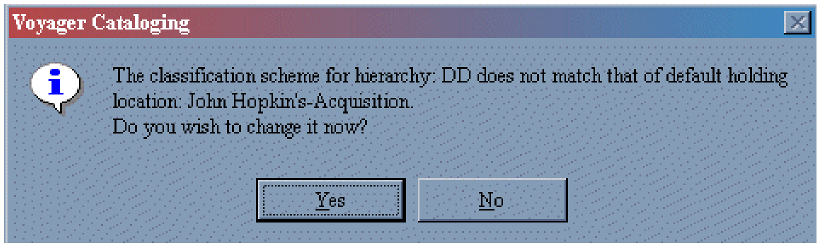

Figure 2-35. Setting call number hierarchy to a non-corresponding default holdings/item location

Using Get Call Number from Bib Record

Once setup is complete, you are ready to use the following procedure to get the call number from the bibliographic record.

The procedure for getting a call number from a bibliographic record is shown in Procedure 2-17, Getting Call Number from Bibliographic Record, on page 2-48.

Procedure 2-17. Getting Call Number from Bibliographic Record

Use the following to get a call number from a bibliographic record.

1. Retrieve an existing MFHD using standard Cataloging functions.

IMPORTANT:
It is not required to have the MFHD's corresponding bib record open to use the get call number from bib record function. However, you can have the bib record open if you wish. The system ***will know*** *which bib record corresponds to the MFHD because bib records and MFHDs are linked in Voyager.*

2. When you are ready to insert the call number, select **Record>Get call number from bib record** from the Cataloging toolbar (see Figure 2-36), or use the **Ctrl+n** keystroke. This causes the call number to be placed in the **852|h** and **852|i** field of the MFHD. The call number is automatically placed in the appropriate field regardless of where your cursor is positioned in the MFHD fields.

NOTE:
If you only have a bib record open but not a MFHD, the **Record>Get call number from bib record** menu option is grayed out, and the **Ctrl+n** keystroke does not do anything.

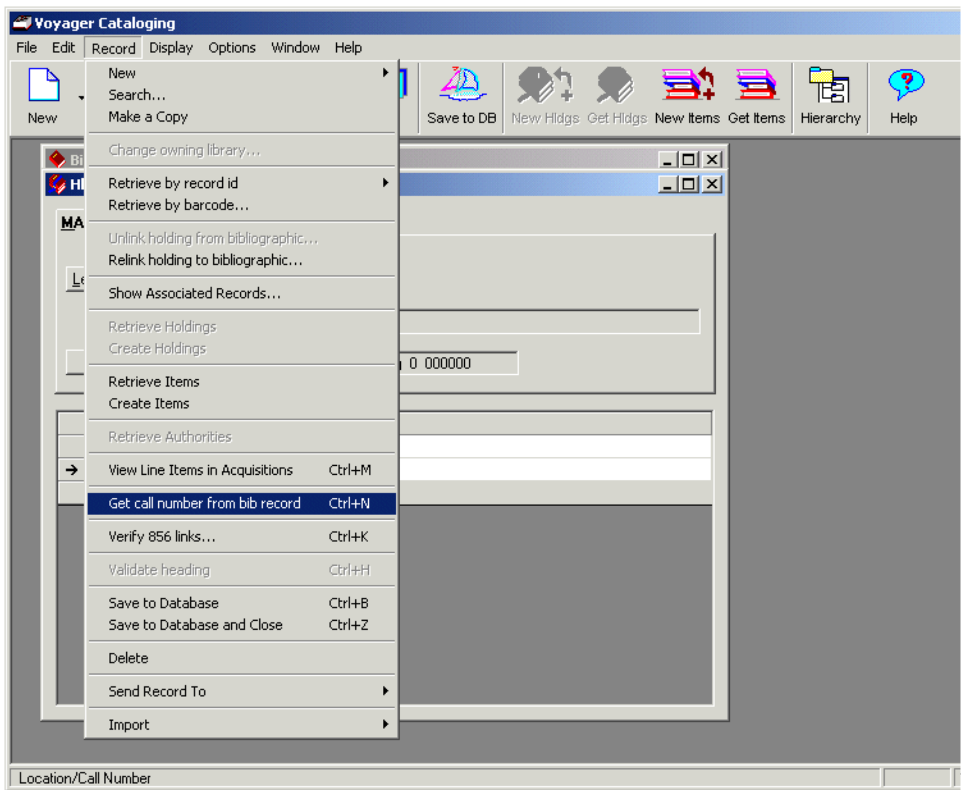

Figure 2-36. Get call number from bib record menu option

NOTE:
If the associated bib record does not include the call number fields defined in the call number hierarchy you selected such as the fields are deleted, get call number from bib record does not work. You still see the function on the **Record** menu of the Cataloging toolbar (it is not grayed out), but selecting the function does not cause an effect in the MFHD **852** field. For example, if you have selected an LC call number hierarchy based on the **050** field, but the associated bibliographic record does not contain the **050** field, you are not able use the function.

On the other hand, if the associated bib record includes call number fields that are empty of data, you receive two warning messages when using get call number from bib record.

The first message informs you that the call number field is invalid, and that you need to check for the presence of subfield diameters and codes. Then, if you click **OK**, you receive a second message.

The second message informs you that the system is unable to assemble the holdings record (or unable to assemble the bib record if the associated bib record is open). For example, if the MFHD's associated bib record contains an **050** field that is empty of data but the field itself is not deleted, you receive the two warning messages.

3. Save your MFHD in standard Voyager Cataloging fashion.

NOTE:
In cases where you are replacing an existing call number with one from the same classification scheme or not, you receive a warning message before the call number is replaced. See Figure 2-37. If you click **Yes**, the existing call number will be replaced; if you click **No**, the call number will not be replaced.

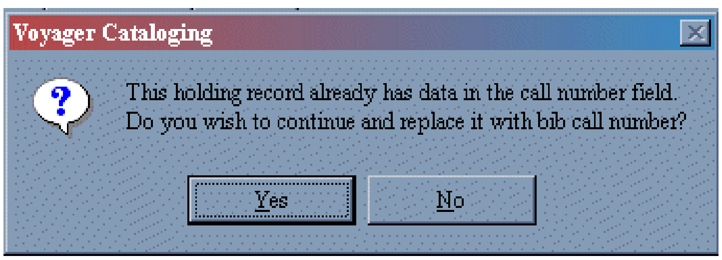

Figure 2-37. Message for replacing an existing call number with a new one

If you are replacing the call number with one from a different classification scheme such as LC to Dewey), you receive a second warning message. See Figure 2-38. This warning message ensures that you are aware that the existing call number is from a different classification scheme than the new one. If you click **Yes**, the call number is replaced. This also automatically changes the **852** field's first indicator to the appropriate value. If you click **No** the call number is not replaced.

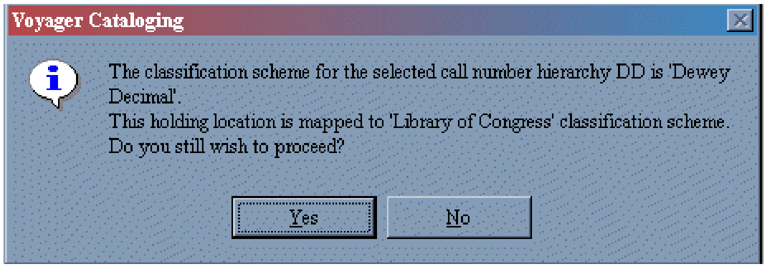

Figure 2-38. Message for replacing an existing call number with a new one from a different classification scheme

System Tab

Pressing **Alt + S** from an open holdings record will switch you to the **System** tab.

The **System** tab contains the options to approve records for export and to suppress records from OPAC. In addition, the Owning Library for the record displays. See Figure 2-39. All the information relating to **OK to export** is located on the **System** tab, including whether or not the record is OK to be exported (YES/NO), the date on which the **OK to export** option should take effect, the date on which the **OK to export** option was last set, the operator who set the record as **OK to export**, and the location at which **OK to export** was set.

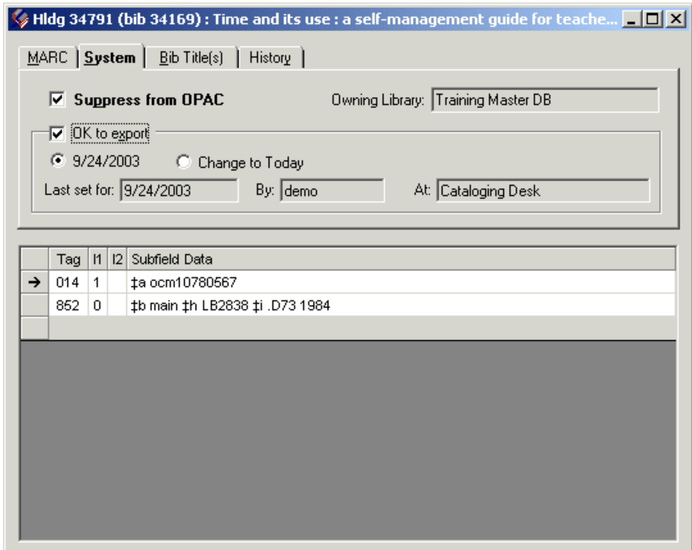

Figure 2-39. Holdings Record: System Tab

OK to Export Option

The **OK to export** option is used by libraries that export records. See the "Bulk Export of MARC Records" section of the *Voyager Technical User's Guide* for details on exporting records.

Checking the **OK to export** box confirms that the holdings record is acceptable for export. You must click the **Save to Database** button for it to take effect. If the **OK to export** box already contains a check mark, that indicates that an operator has either approved the record for export at an earlier date, or the record was automatically authorized for export when it was imported. To automatically mark records as **OK to export**, see the "Bulk Export of MARC Records" section of the *Voyager Technical User's Guide*.

When **OK to export** is set and the record has been saved to the database, two radio buttons become active on the **System** tab. These radio buttons allow you to either select the last date on which the **OK to export** option was set, or to select today's date (**Change to Today r**adio button). If you select **Change to Today** and then click the **Save to Database** button, the **OK to export** date will change to today's date.

NOTE:
The **OK to export** option resets during the actual export process. The date, operator, and location at which the **OK to export** option was last set display below

the **OK to export** check box and the two radio buttons indicating export dates, in the **Last set for:**, **By:**, and **At:** textboxes.

Suppress from OPAC Option

To prevent a holdings record from displaying in the OPAC module, mark the **Suppress from OPAC** check box. This does not prevent the display in OPAC of information from the bibliographic record. However, this prevents information from attached item records from displaying in the OPAC. However, if the **Suppress from OPAC** check box for a location is checked in the System Administration module, you cannot uncheck the **Suppress from OPAC** check box in Cataloging. See the "Locations" section of the *Voyager System Administration User's Guide* for details.

TIP:
*When the **Suppress from OPAC** box is checked, the small book icon in the top left corner of the record is greyed. When the check box is unchecked, the icon displays in a reddish-burgundy shade. This gives you a visual indication of the status of the record.*

Bib Title(s) Tab

The **Bib Title(s)** tab (see Figure 2-27) shows the associated bibliographic ID and title for the holding. Double-click the **title** to display the bibliographic record.

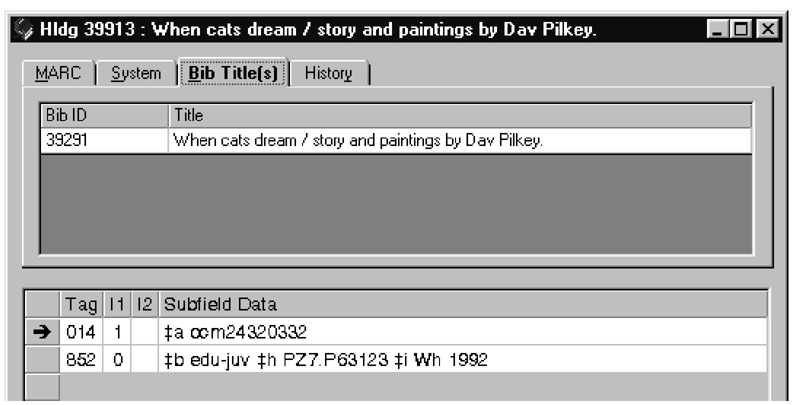

Figure 2-40. Holdings Record Bib Title(s) Tab

Typically, only one title displays. If the holding record is bound with, multiple titles display, one title for each bibliographic record within the bound holding.

History Tab

Press **Alt + Y** from an open holdings record to switch to the **History** tab.

The **History** tab includes a list of every change ever made to a holdings record (see Figure 2-41). These changes are described in Table 2-6.

Table 2-6. History Tab Field Descriptions

Field Name	Description
Date/Time	The date and the time the change was made.
Operator	The operator who made the change (actually the operator name as assigned in System Administration).
Cataloging Location	The happening location (as defined in System Administration) at which the change was made.
Action	The action performed on the record (UPDATE, CREATE, MERGE, REPLACE, or RELINK).
Encoding Level	The encoding level as set in the **Leader** field of the record.
Suppress Action	Whether or not the Suppress from OPAC check box was checked on the **System** tab.

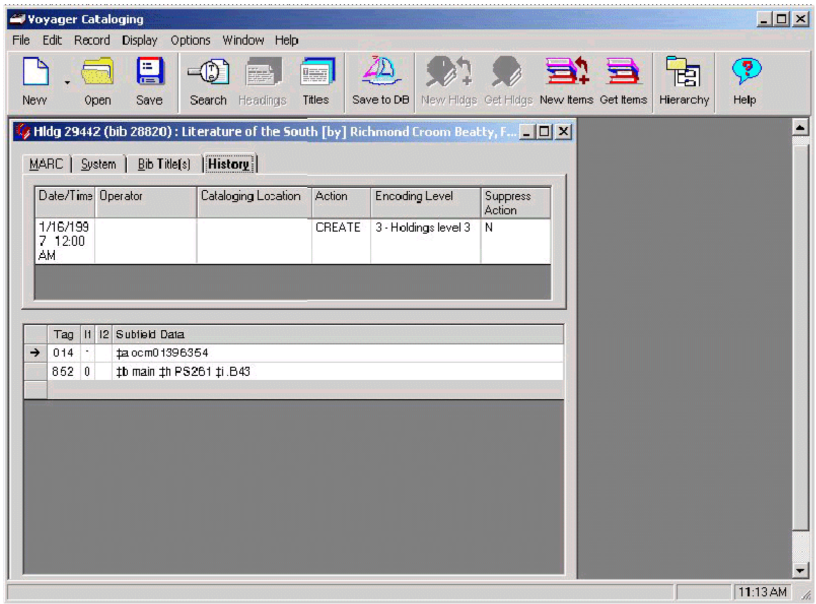

Figure 2-41. Holdings Record: History Tab

Sorting the columns

You can sort each of the **History** tab columns in ascending or descending order by clicking the column header.

Lag Time

In cases where a record has undergone massive amounts of changes such as 1000, you may find a small lag time when you click the **History** tab (or select **Alt + Y**). This is because the **History** tab is dynamically updated by your Voyager system each time you click it. The lag time should not be more than a few seconds.

Viewing and Editing Line Items from Holdings Records

It is possible to view (and then manipulate) a line item in the Acquisitions module from the associated bibliographic or holdings record in the Cataloging module. This feature is known as Acquisitions in Cataloging or Acq in the Cat.

Acq in the Cat is the second half of the two-way communication between the Acquisitions and Cataloging modules. See the "Viewing and Editing MARC Records" section of the *Voyager Acquisitions User's Guide* for details. Cat in the Acq allows you to view and then edit a MARC record in the Cataloging module from the associated line item in the Acquisitions module.

For details and instructions on using the Acq in the Cat feature, see Viewing and Editing Line Items (Acquisitions in Cataloging) on page 3-68.

Item Records

An Item Record (see Figure 2-42) describes a single item owned by your institution. An item record can be created by selecting **Record>Create Items**, or by clicking the **Create Items** button when a bibliographic or holdings record is the active record.

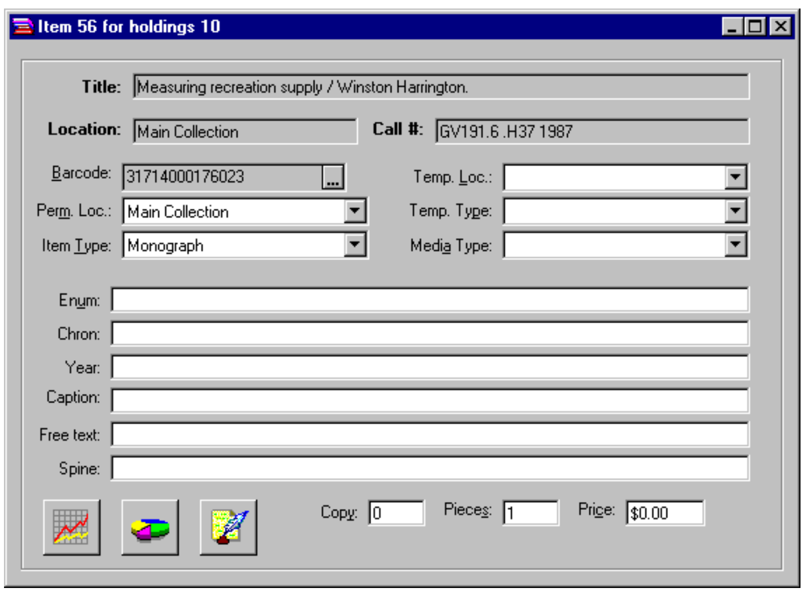

Figure 2-42. Example of an Item Record

Checking for Duplicate Barcodes

Any time an item barcode is being created or edited, Voyager tests for the existence of duplicate barcodes in the database. When the barcode you are attempting to attach to an item is already in use elsewhere, you will be advised of this fact with a dialog box and asked if the barcode should be used anyway.

You may enable or disable this feature by clicking the **Check for Duplicate Item Barcodes** check box on the **Work Flow** tab in Cataloging's Session Defaults and Preferences (see Figure 2-43).

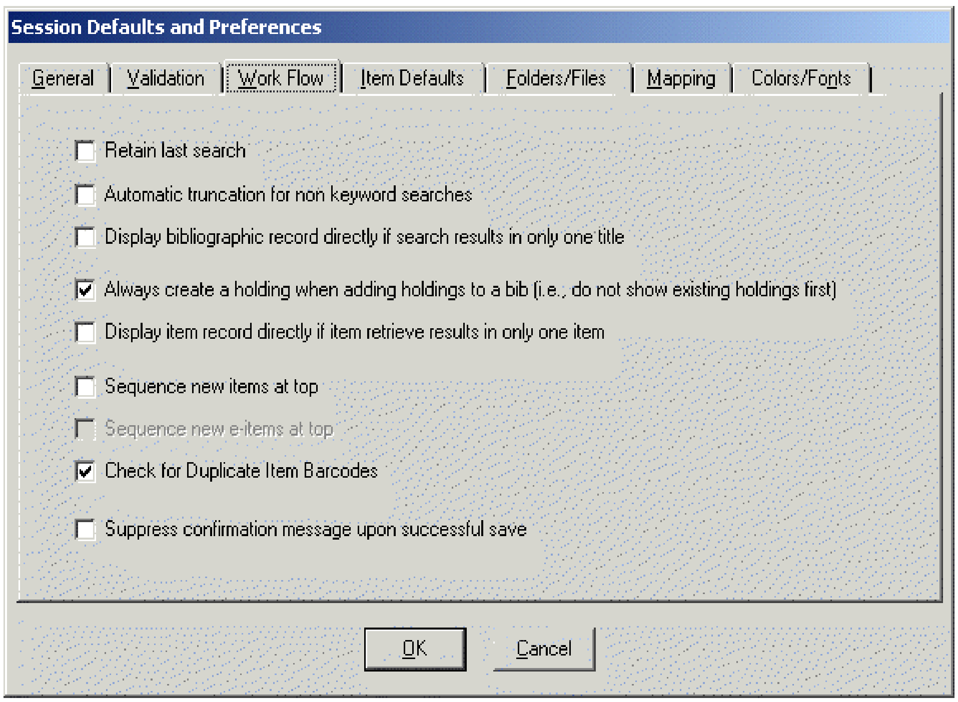

Figure 2-43. Enabling/Disabling the Check for Duplicate Barcodes option

Header Information

You cannot add to or change the item record information described in Table 2-7.

Table 2-7. Item Record Header Information

Field Name	Description
Title(s)	Lists the title of the item. If more than one bibliographic record is attached to that item record such as two books in one binding, this section displays a drop-down list with all associated titles.
Location	The location's name from the holdings record.
Call #	The call number, as specified in the 852 field of the holdings record.

Location and Type

You can add to or change the information described in Table 2-8 by selecting from the appropriate drop-down list(s). However, if a location is assigned to an item, and that location does not belong to a Circulation Group as defined in System Administration, then that item cannot be charged to any patron.

Table 2-8. Item Record Location Options

Field Name	Description
Perm. Loc	The item's permanent location.
Type	The item's permanent type.
Temp. Loc.	The item's temporary location (if any).
Temp. Type	The item's temporary assigned type (if any).
Media Type	The item’s media type (if any).

Item/Holdings

You can add to or change the information described in Table 2-9 by entering the appropriate text.

Table 2-9. Item Record Holdings Options

Field Name	Description
Enumeration	The item's enumeration such as the volume number.

Table 2-9. Item Record Holdings Options

Field Name	Description
Chronology	The item's chronology such as April.
Year	The enumeration year (if serially published) or the publication year (if an individual item).
Caption	Any additional title information.
Free Text	Any additional item information.
Spine	Any additional item information that displays on the spine label.
Note	Any note that relates to the item up to 910 characters.

Item Details

You can add to or change the following information by entering the appropriate text.

Table 2-10. Item Record Detail Options

Field Name	Description
Barcode	The item's barcode (if any). This can be one active and possibly several inactive barcodes in a drop-down list. **NOTE:** Pressing either **F4** or the ellipses button brings up the **Barcodes** dialog box from which you can add or delete barcodes. The **F4** button does not bring up the **Barcodes** dialog box if the item record is new and has not yet been saved to the database. Likewise, the ellipses button is disabled if the record is new and has not yet been saved to the database. If you click inside another field before pressing **F4**, the **Barcodes** dialog box does not display.
Copy	The copy number (if any).
Pieces	The number of pieces that go with the item.
Price	The item price. If no price is assigned, and replacement costs are designated to be calculated for lost items, the default replacement for the item type is used.

Statuses

Each item record has a status field that describes the item's state of being such as checked out or damaged. If more than one status applies, the items are kept in reverse chronological order according to the date they were assigned. The **Status** button is shown in Figure 2-44.

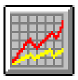

Figure 2-44. Status Button

NOTE:
You can only view item statuses when an item record is the active record.

See the *Voyager WebVoyáge User's Guide* for information about user-defined item status terminology in OPAC.

Table 2-11 contains a complete list of possible statuses. Statuses are listed according to rank. A status is only viewed in the module if all of the other statuses currently applied to the item are below it in rank. Thus, a status higher on the list takes precedence over a status lower on the list.

Table 2-11. Possible Statuses Listed According to Rank

Scheduled	Assigned automatically when the item has been scheduled by the Media Scheduling module.
In Process	Assigned manually when the item's record is being reviewed, or some similar activity is being performed.
Lost (system)	The status is automatically assigned to overdue items that have not been returned within an interval defined by the library. The system will not calculate additional late fees once this status is given.
Lost (library)	The status is manually assigned to over-due items that have not been returned within an interval defined by the library. The system will not calculate additional late fees once this status is given.

Table 2-11. Possible Statuses Listed According to Rank

Missing	The item has been labeled missing according to library policies. May be manually assigned.
At bindery	The item has been sent to the bindery. This status can only be assigned manually.
Charged	Currently charged to a patron with a future due date. Automatically assigned.
Renewed	Currently charged to a patron for an additional period with a future due date. Automatically assigned.
Overdue	Currently charged to a patron with a past due date, but not yet lost or stolen. Automatically assigned.
On Hold	An item is on a hold shelf waiting for the patron who placed a recall/hold request for the item. Automatically assigned.
In Transit	An item is en route from one location to another. May be manually assigned.
In Transit (Discharged)	A courtesy discharge has taken place and the item is now on its way home. Automatically assigned.
In Transit (On Hold)	An item is en route to a hold shelf at a location selected by the requesting patron. Automatically assigned.
Recall Request	One or more patrons have placed a request for an item currently charged to another patron; a recall request can shorten the loan interval in effect. Automatically assigned.
Hold Request	One or more patrons have placed a request for an item that may or may not be currently charged to another patron. A hold request never affects the loan interval if the item is currently charged. Automatically assigned.
Short Loan Request	One or more patrons have placed a short loan request for an item.

Table 2-11. Possible Statuses Listed According to Rank

Remote Storage Request	One or more patrons have placed a request for an item that is in a remote storage area.
Call Slip Request	One or more patrons have placed a request for an item in a closed stacks area.
Discharged	An item has been discharged and is currently on the shelf or in its way there and is in effect until the expiration of the circulation policy group shelving interval. Automatically assigned.
Not Charged	Should be on the shelf and is assigned after discharge and expiration of shelving interval for the applicable circulation policy group. Automatically assigned.
Catalog Review	The item has been marked for Catalog review. May be manually assigned.
Circulation Review	The item has been marked for Circulation review. May be manually assigned.
Claims returned	A patron reports an item as having been returned, but there is no record of discharge. Usually such an item is also overdue and possibly missing or lost. May be manually assigned. This status only exists with other statuses and takes on the rank of the other status.
Damaged	The item has been damaged according to library policies. May be manually assigned. This status only exists with other statuses and takes on the rank of the other status.
Withdrawn	The item has been withdrawn from the circulating collection. May be manually assigned. This status only exists with other statuses and takes on the rank of the other status.

The procedure for assigning a status is shown in Procedure 2-18, Assigning a Status, on page 2-63.

Procedure 2-18. Assigning a Status

Use the following to assign a status to an item.

1. Select **Item>View Status**. The **Item Status** dialog box opens (see Figure 2-45).

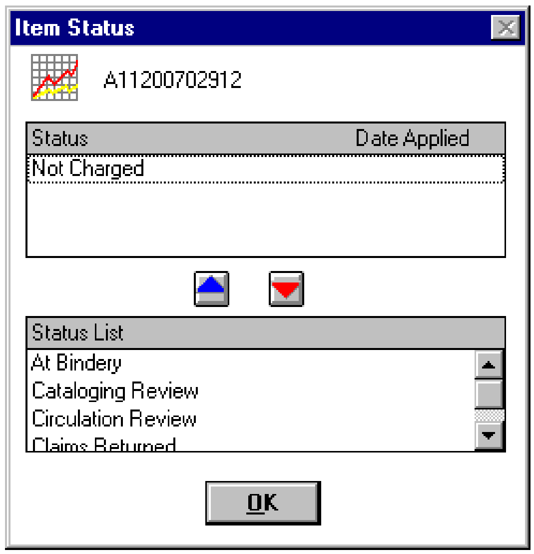

Figure 2-45. Item Status dialog box

There are two areas displayed for status information, the actual applied Status box, and the Status List which contain the possible statuses. The number, if any, which displays at the top of the dialog box is the barcode assigned to the current item.

2. To apply a status, select the appropriate status from the **Status List** drop-down list and click the blue **up arrow** (see Figure 2-46). The status displays in the Status box. Once a status is applied to an item, it is no longer available in the Status List.

   To delete the status, highlight the appropriate status in Status box and click the red **down arrow** (see Figure 2-46). The status returns to the **Status List** drop-down list.

Figure 2-46. Blue Up and Red Down Buttons

3. Click the **OK** button to save the item statuses you've added or deleted and close the **Item Status** dialog box.

Statistical Categories

For statistical purposes, a site can define types of item characteristics that are not needed for cataloging but are useful for statistical compilations. The statistical categories are not associated with any one item type and there is no limit on the number created. When an operator creates a item record and assigns the item type an operator can select one or more statistical categories from the list. The **Statistical Categories** button is shown in Figure 2-47.

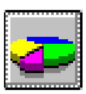

Figure 2-47. Statistical Categories Button

Item Statistical Categories are defined from System Administration and can only be assigned manually.

NOTE:
You can only view item statistical categories when an item record is the active record.

The procedure for assigning Statistical Categories is shown in Procedure 2-19, Assigning Statistical Categories, on page 2-64.

Procedure 2-19. Assigning Statistical Categories

Use the following to assign a statistical category to an item.

1. Select **Item>View Statistics**. The **Item Statistical Categories** dialog box opens (see Figure 2-48).

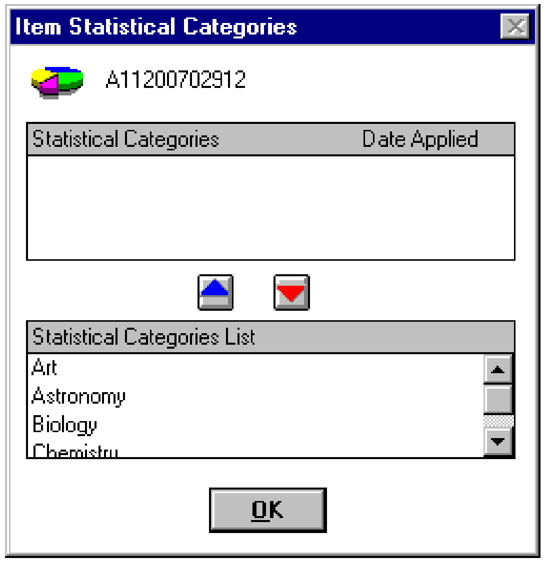

Figure 2-48. Item Statistical Categories dialog box

There are two areas displayed for category information, the actual applied Statistical Category box, and the Statistical Categories List which contain the possible categories. The number which displays at the top of the dialog box is the barcode assigned to the current item.

2. To apply a statistical category, select the appropriate category from the **Statistical Categories List** and click the blue **up arrow** (see Figure 2-49). The category displays in the Statistical Categories box. Once a category is applied to an item, it is no longer available in the Statistical Categories List.

Figure 2-49. Blue Up and Red Down Buttons

To delete the category, highlight the appropriate category in Statistical Categories box and click the red **down arrow** (see Figure 2-49). The status returns to the **Statistical Categories List**.

3. Click the **OK** button to save the statistical categories that you have added or deleted and close the **Item Statistical Categories** dialog box.

Creating, Opening, and Viewing Records

3

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Contents

Creating, Opening, and Viewing Records

3

Creating and Opening Records

This section describes creating and working with records in the Cataloging module.

Creating a Record

Before you can create a record, there must be at least one template for the type of record that you want to create in the Cataloging folder of the Voyager directory. The Cataloging client comes installed with the following templates.

- `bib.tem`
- `auth.tem`
- `hldg.tem`.

For information on creating your own templates, see Creating a New Template on page 8-2.

This section describe how to create new records for the following.

- Authority/Bibliographic entries. See Procedure 3-1, Creating a New Record, on page 3-2.
- Holdings when a bibliographic record is open. See Procedure 3-2, Creating a Holdings Record When a Bibliographic Record is Open, on page 3-5.

- Item entries from an active Holdings record. See Procedure 3-3, Creating an Item Record from an Active Holdings Record, on page 3-8.

The procedure for creating a new record is shown in Procedure 3-1, Creating a New Record, on page 3-2.

Procedure 3-1. Creating a New Record

Use the following to create a new record.

1. Select from the toolbar **Record>New>Authority** or **Record>New>Bibliographic** (Or click the arrow next to the **Create a new record from a template** button, and select **Authority** or **Bibliographic**. See Figure 3-1.)

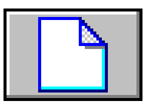

Figure 3-1. New Record Button

NOTE:
You can only choose between creating a new Authority or Bibliographic record here because Holdings records can only be created when a Bibliographic record is the active record, and Item records can only be created when a Holdings record is the active record.

Result: The **Select Bibliographic Template** dialog box opens (see Figure 3-2) if you have not specified a particular template in your **Session Defaults and Preferences**. **Session Defaults and Preferences** allows you to specify a file path for the Authority/Bibliographic templates. Your result may differ depending on what **Session Defaults and Preferences** have been set.

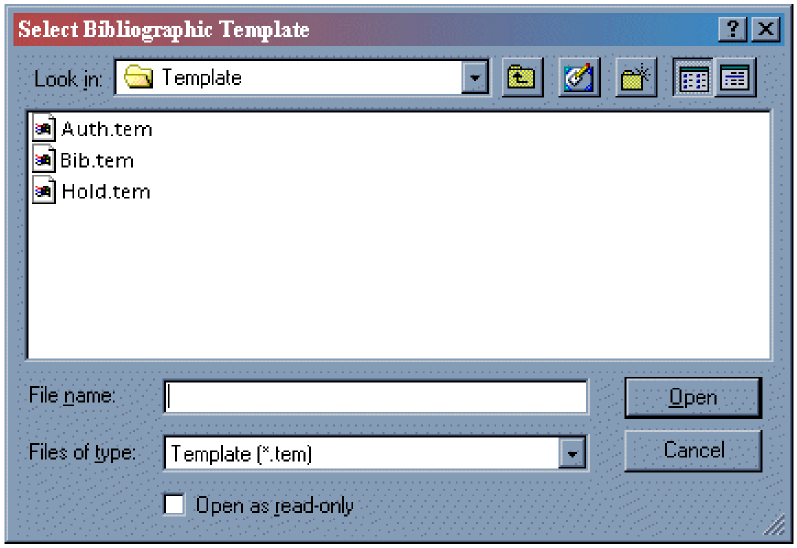

Figure 3-2. Selecting a template for a new record

2. Select the template you want to use, and click **Open**. (If you have specified a template in your Session Defaults and Preferences, this dialog box does not open.)

   Result: The new record displays (see Figure 3-3) with a minimal template that contains a **Leader**, fixed fields, and variable fields.

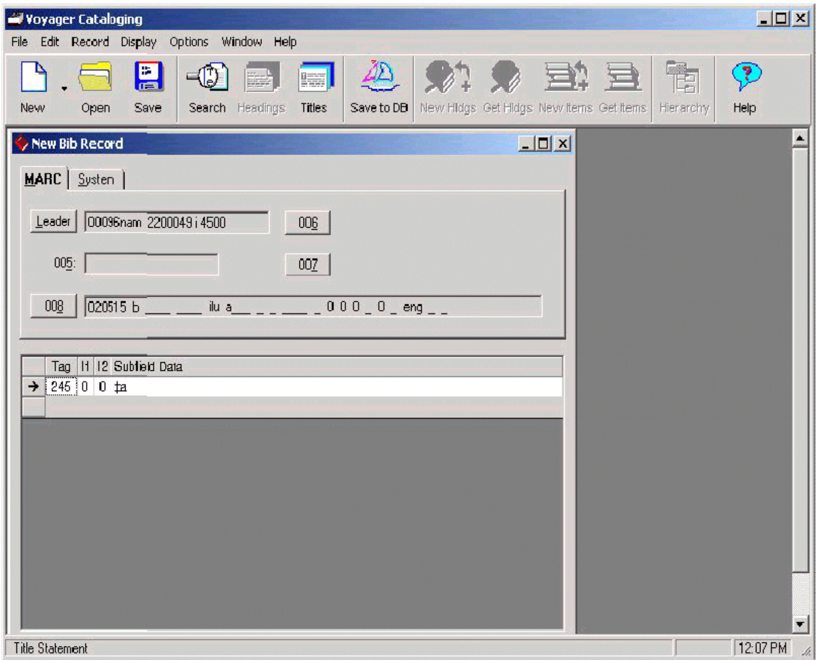

Figure 3-3. New bibliographic record template example

NOTE:
You must select a template from the **Select Bibliographic Template** or **Select Authority Template** dialog box that corresponds with the type of record you elected to create. For example, if you elected to create an Authority record, you can only choose a template for Authority records. Otherwise, you get the following error message (see Figure 3-4).

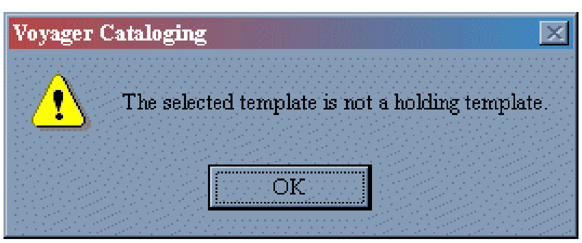

Figure 3-4. Error message for selecting an inappropriate template

3. Complete the appropriate fields in the record and click **Save**.

The fields entered are different for each record type. For more information, see Bibliographic Records on page 2-3, see Authority Records on page 2-28, see Holdings Records on page 2-36, or see Item Records on page 2-56.

Result: A New Record is saved to the database.

NOTE:
When adding a Bibliographic record, it is important to remember that the assigned Owning Library is the Owning Library of the Cataloging location the user logs in with. For more details on Owning Libraries, see the *Voyager System Administration User's Guide*.

The procedure for creating a holdings record when a bibliographic record is open is shown in Procedure 3-2, Creating a Holdings Record When a Bibliographic Record is Open, on page 3-5.

Procedure 3-2. Creating a Holdings Record When a Bibliographic Record is Open

Use the following to create a holdings record when a bibliographic record is open.

1. Select **Record>Create Holdings** or click the **Create Holdings** button (see Figure 3-6).

   Result: A new holdings record displays for the active bibliographic record (see Figure 3-7) if you have selected a default template in Cataloging's **Session Defaults and Preferences** (Folders/Files Tab (Figure 10-6) on page 10-12).

   If you have not selected a default template, the **Create Holdings** button opens the **Select Holdings Template** dialog box allowing you to navigate to the appropriate template. If you select a template from the **Select Holdings Template** dialog box that is not a holdings record template, you get the following error message (see Figure 3-5).

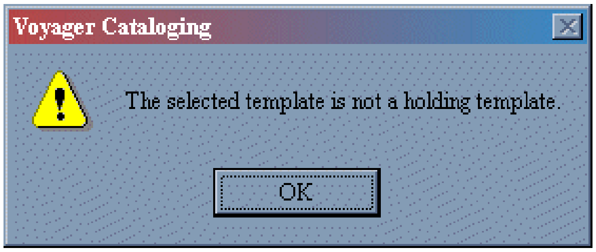

Figure 3-5. Error message for selecting an inappropriate template

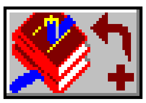

Figure 3-6. Create Holdings Button

NOTE:
If the bibliographic record contains more than one instance of the field that contains the call number, the last one listed in the bibliographic record is used in the new holdings record.

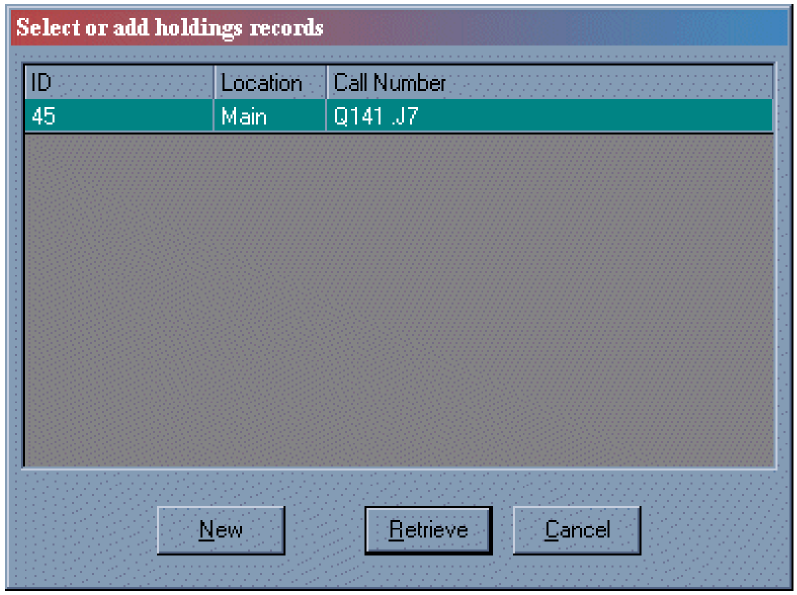

Figure 3-7. Dialog box for creating a Holdings record from an open Bibliographic record when one already exists

2. Complete the appropriate fields in the record and click **Save**.

   Result: A New Holdings Record is saved to the database.

NOTE:
If the active bibliographic record already has a holdings record associated with it, Voyager opens a dialog box that warns you of the existing holdings record (Figure 3-7). This dialog box only opens if you have not selected **Always create a holding when adding holdings to a bib** on the **Workflow** tab in Cataloging's Session Defaults and Preferences (Work Flow Tab (Figure 10-4) on page 10-8).

From this dialog box you can do the following.

- Retrieve the existing holdings record by clicking the **Retrieve** button
- Create a new one by clicking the **New** button
- Cancel by clicking the **Cancel** button.

IMPORTANT:
If the Cataloging user is not allowed to attach a Holdings record to an Owning Library, the Owning Library of the location in the 852|b field is

checked against the Owning Library of the linked Bibliographic record. Then, if the Owning Libraries are different, a message is displayed in Cataloging, and the user is barred from saving the Holdings record. This check is only performed if the Location is a valid Location for the user's login. For more details on Owning Libraries, see the Voyager System Administration User's Guide.

The procedure for creating an item record from an active holdings record is shown in Procedure 3-3, Creating an Item Record from an Active Holdings Record, on page 3-8.

Procedure 3-3. Creating an Item Record from an Active Holdings Record

Use the following to create an item record from an active holdings record.

1. Select **Record>Create Items**, or click the **Create Item** button (see Figure 3-8).

   Result: A default Item record opens.

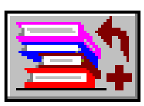

Figure 3-8. Create Item Button

2. Complete the appropriate fields, and click **Save**.

   Result: A New Item Record is saved to the database.

Opening a Record

This section describes opening a record from a work folder and from the OPAC.

From a Work Folder

Voyager Cataloging allows you to create, edit, and save records in work folders, as well as in the database. Records that are saved in work folders are called, work records. These records operate in the same way as other records except they are not validated against the MARC tag tables or authority records (until the records are saved to the database). The **Open Record from Work Folder** button is shown in Figure 3-9.

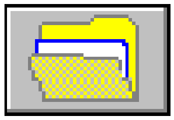

Figure 3-9. Open Record from Work Folder Button

TIP:
If you are copying records between internal databases, it is recommended that you use the import function instead of saving records to work folders and opening them in the new database. This is because work records keep the 001 field, and no duplication checking occurs between a work record and the database.

The procedure for opening a work record is shown in Procedure 3-4, Opening a Work Record, on page 3-9.

Procedure 3-4. Opening a Work Record

Use the following to open a work record.

1. Select **File>Work Record>Open**.

   Result: The **Select Work File** dialog box opens.

   You can specify a folder to which this dialog box defaults in Cataloging's Session Defaults and Preferences. See Folders/Files Tab (Figure 10-6) on page 10-12 for details.

   NOTE:
   If Voyager does not find a folder called `work`, one will be created for you. However, you can open (or save) records to any directory.

2. Click the appropriate record name from the work folder. The suffix of the record file indicates what type of record it is.

Result: The record name is highlighted.

3. Click **Open** to open the record, or click **Cancel** to close the dialog box without opening a record.

   Result: **Open** displays the **Select work records** dialog box. Cancel returns you to the main Cataloging display.

NOTE:
Because the **Suppress from OPAC** check box is not a part of the MARC 21 record, that information is not saved when the record is saved as a work record. Each time that you retrieve a work record in order to save it to the database, the **Suppress from OPAC** check box must be marked appropriately.

From the OPAC

To retrieve a record from the Online Public Access Catalog (OPAC), you must use **Record>Search** to find and open a record. For more information, see Search Dialog Box on page 3-28.

Bibliographic Tree

When you click the **Hierarchy** button (see Figure 3-10) from an open record (or select **Record>Show Associated Records** from the Cataloging toolbar), the bibliographic, holdings, items, and bound with information displays in a hierarchy dialog box. The hierarchical tree displays in colors that you set in Cataloging's Session Defaults and Preferences (see Session Defaults and Preferences on page 10-1).

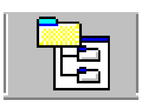

Figure 3-10.   Hierarchy Button

If more information is associated with the Bibliographic ID or Holdings, a **+** (plus sign) displays to the left of the preceding ID number. When you click the plus sign, the Holdings, Item, or Bound Withs display (see Figure 3-11). If you want to display a record, highlight it and then click the **Retrieve** button. Click **Close** to close the **Holdings and Items** dialog box.

NOTE:
Holdings records also display any associated on-order information.

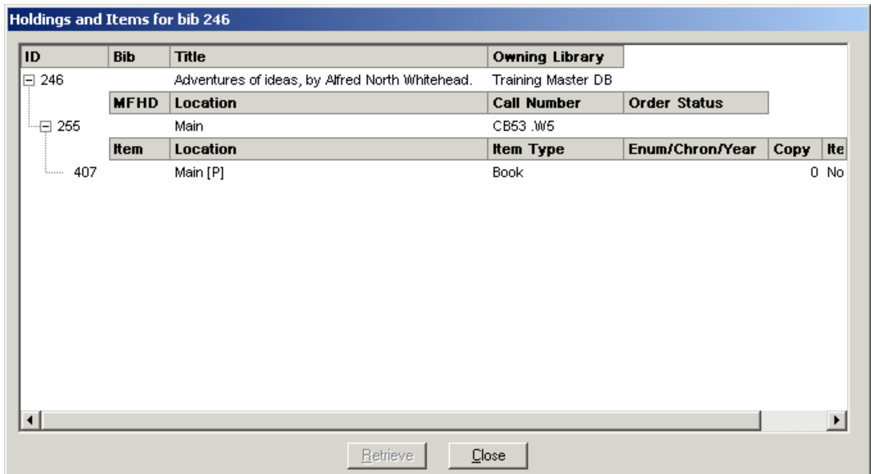

Figure 3-11. Holdings and Items for Bibliographic Records

Importing Records

You can import MARC-formatted bibliographic and authority records into Voyager using Cataloging's importing features. Any MARC 21 record can be imported, including records you download from a cataloging utility such as OCLC or RLIN. You can specify the character set to which you want imported records mapped such as the following in Cataloging's Session Defaults and Preferences.

- Latin1 (non-Unicode)
- MARC 21 MARC8 (non-Unicode)
- MARC21 UTF-8
- OCLC (non-Unicode)
- RLIN legacy (non-Unicode)
- Voyager legacy (non-Unicode)

See Mapping Tab (Figure 10-7) on page 10-14 for more information.

Depending on the Import/Replace profile you have established in the System Administration module, imported records can either replace existing records, merge with existing records, be added to the database, or not be added to the database. See the *Voyager System Administration User's Guide* for details on

Import/Replace profiles. The Import/Replace profile you establish in System Administration is defined in Cataloging's Session Defaults and Preferences. See Session Defaults and Preferences on page 10-1 for more information.

Records can be imported in the following ways through the Voyager Cataloging module.

- From a file, a new file, or one you previously accessed
- From another database

NOTE:
Records can also be imported in batch mode which is a method of processing many records as a group versus one at a time. This method utilizes the Voyager BulkImport and Prebulk programs. For more information about utilizing this method for importing, see the *Voyager Technical User's Guide*.

Importing Records From a File

The procedure for importing records from a file is shown in Procedure 3-1, Creating a New Record, on page 3-2.

Procedure 3-5. Importing Records From a File

Use the following to import records from a file.

1. Select **Record>Import>From new file** or **Record>Import>From previous file**.

   You can specify a default folder from which you want to import records in Cataloging's **Session Defaults and Preferences** (see 10-12).

   Result: The **Select Import File** dialog box opens (see Figure 3-12).

   NOTE:
   For the **Record>Import>From previous file** command to be enabled, you must first select a new file (via the **Record>Import>From new file** command). If you have not selected a new file, or if you exit Cataloging and log back in, the **Record>Import>From previous file** command will be grayed out.

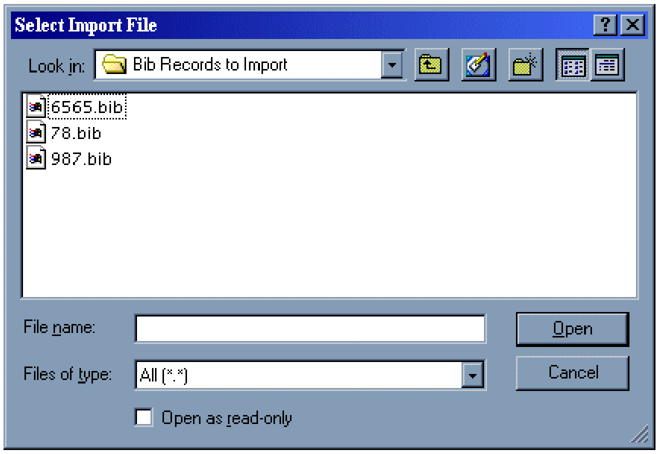

Figure 3-12. Select Import File dialog box

2. Select the file you want to import and click **Open**.

   Result: A dialog box opens, allowing you to select the specific record you want to import (Figure 3-13).

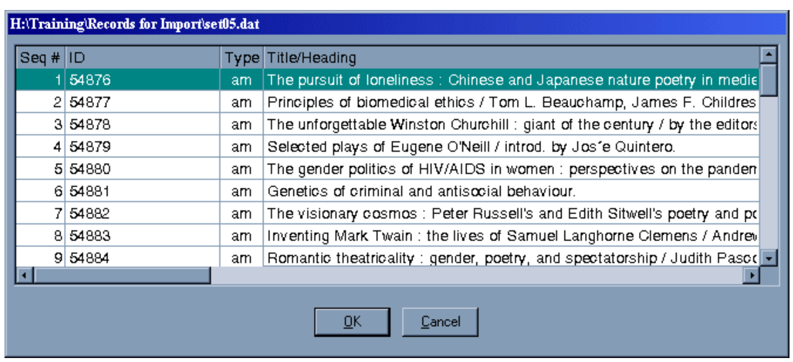

Figure 3-13. Selecting a record to import

The dialog box that opens when you select a file from which you want to import records includes the four columns described in Table 3-1. See Figure 3-13.

Table 3-1. Description of Column Headings for Import Record List

Column Name	Description
Seq #	Sequential count of the order in which the record was added to the import file. For example, if the record was added to the import file fourth, the Seq # would be **4**).
ID	Record ID assigned by the database or utility of origin.
Type	Record type and bibliographic level from bytes **6** and **7** of the **Leader** field.
Title/Heading	The **245** field (if a bibliographic record), or the **1XX** field (if an authority record).

NOTE:
The number of valid records and the number of invalid records in the file are displayed in the Status bar of the Cataloging module. Invalid records are not displayed in the dialog box listing records to import, and cannot be imported. For resolving problems with invalid records, see Invalid Recordson 3-24.

3. Highlight the record(s) you want to import. The number of records you can import at one time depends on your machine's available memory.

   Result: The records are highlighted for import.

4. Click **OK** to import the selected record(s), or click **Cancel** to close the dialog box without importing the selected record(s).

   Result: An imported record is displayed with a new **035** field which contains the old **003**, followed by the **001**.

5. Save the records as work files, or save them to the database.

   Result: Duplication checking occurs when a record is saved to the database. For more information, see Save to Database on page 4-7.

Importing Records From Another Database

In addition to importing records from a new or previously used file, it is also possible to import records from another database. You can import records from a remote database directly from the **Search** dialog box, as well as perform a simultaneous search of many databases at once.

In order to search for and import records from other databases, you must define the databases to which you want to connect. This is done in the Database Definitions portion of the System Administration module. See the *Voyager System Administration User's Guide* for details.

The procedure for importing records from another database is shown in Procedure 3-6, Importing Records From Another Database, on page 3-15.

Procedure 3-6. Importing Records From Another Database

Use the following to import records from another database.

1. Click the **Search** button from the Cataloging toolbar, or select **Record>Search...**.

   Result: The **Search** dialog box opens (Figure 3-14).

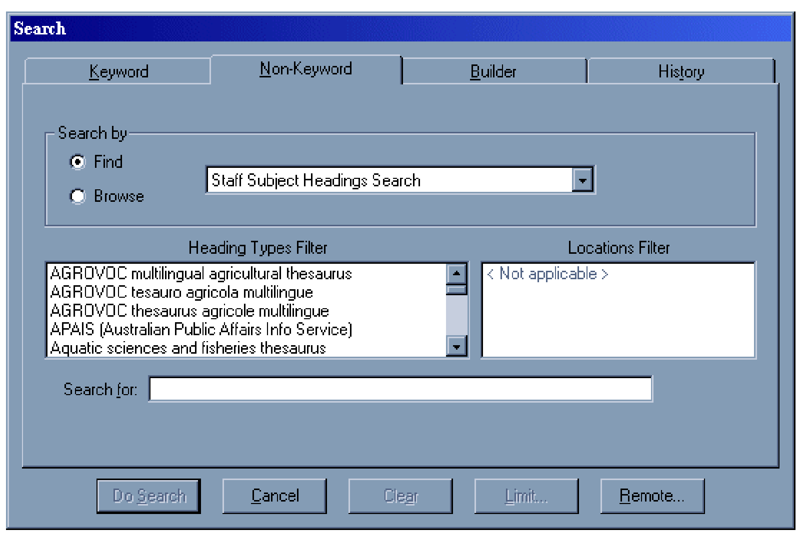

Figure 3-14. Search dialog box

2. Click the **Remote...** button at the bottom right of the **Search** dialog box, or press **Alt + R**. This displays the **Voyager Connection Options** dialog box (Figure 3-15). From this dialog box, you can choose the database(s) to which you want to connect, simultaneously search, and import records.

IMPORTANT:
*For the **Remote...** button to display on the **Search** dialog box, you must establish and define the databases you want to search and import records from in Voyager's System Administration module. For details on this process, see the Voyager System Administration User's Guide.*

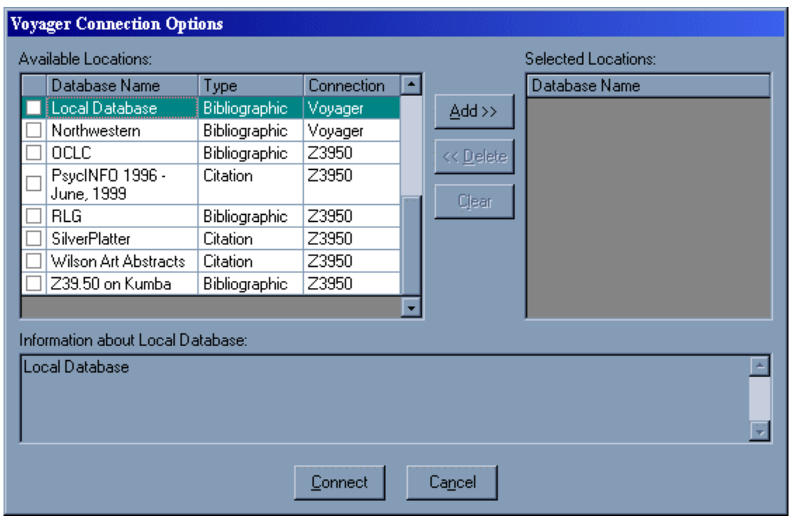

Figure 3-15. Voyager Connection Options dialog box

The **Voyager Connection Options** dialog box is divided into three sections.

- Available Locations
- Selected Locations
- Information About

Available Locations

This section contains a list of all the databases (as you have defined in System Administration), to which you are able to connect and search. You can navigate through this list, by clicking a particular database and using the **up** and **down arrows** on your keyboard.

The list is divided into four columns.

- The first column contains a check box indicating whether or not the database is selected as one to connect to and search.
- The **Database Name** column indicates the name of the database to which you are connecting.
- The **Connection** column indicates the type of connection for the database such as Voyager or Z39.50.
- The **Type** column indicates the type of database like Bibliographic or Citation.

Remember, the database name, connection, type, and so on for each database is established and defined in the Database Definitions portion of Voyager's System Administration module. See the *Voyager System Administration User's Guide* for details.

Selected Locations

This section includes one column, listing the databases by database name you have selected.

Information About

This section contains the description of the database highlighted in the list of Available Locations. The database does not have to be listed in Selected Locations for the description to display. This description is established in a free text field in the Database Definitions portion of Voyager's System Administration module, and may or may not contain the name of the database or the associated institution's online catalog. See the *Voyager System Administration User's Guide* for details.

3. You can add and remove databases from the list of **Available Locations**.

Selecting a Database

From the list of **Available Locations**, highlight one by one the database(s) to which you want to connect, and click the **Add>>** button (or **Alt + A**). This moves the database name over to the list of **Selected Locations** (Figure 3-16). You can also double-click the database in the list of **Available Locations** to select it. You can select as many databases as you want. If you select more than one, they are searched simultaneously.

TIP:
When a database is selected, a check mark displays in the check box located directly to the left of the database name in the list of Available Locations.

Removing a Database

To remove a database from the list of **Selected Locations**, highlight the database and click the **Delete>>** button (or **Alt + D**). You can also double-click the database in the list of **Available Locations** to remove it. To remove all the databases from the list of **Selected Locations** at once, click the **Clear** button.

Exiting the Voyager Connection Options Dialog Box

Click the **Cancel** button to exit the dialog box without connecting to a database(s), or press **Alt + N**.

IMPORTANT:
*The default database searched during Cataloging's staff-side searching is your local database. However, if you want to search your local database at the same time as another database(s), you must select **Local Database** from the list of **Available Locations** in addition to the other database(s) to which you want to connect and search. If you do not select **Local Database**, only the other database(s) you select are searched.*

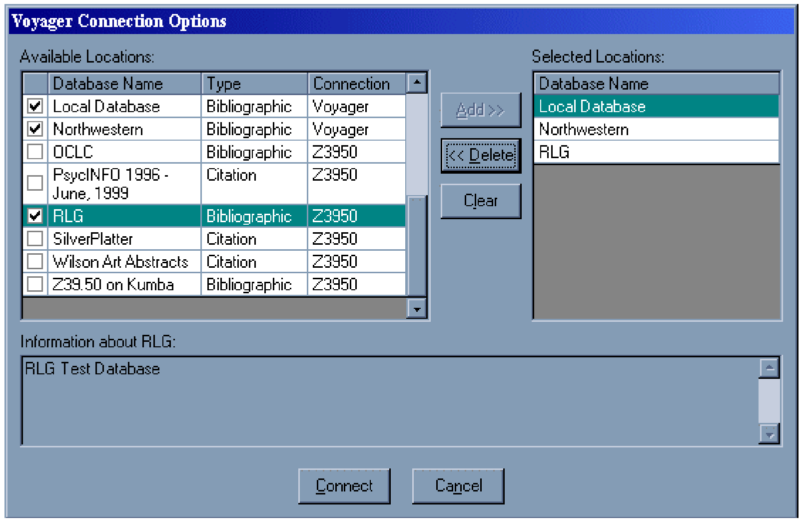

Figure 3-16. Selecting databases to search

4. Click the **Connect** button (or press **Alt + C**) to connect to the database(s) you have selected. If you are connecting to one database, the **Remote Search** dialog box opens, with the name of the database to which you are connected displayed after the colon (Figure 3-17). If you are connecting to more than one database, the **Simultaneous Search** dialog box opens.

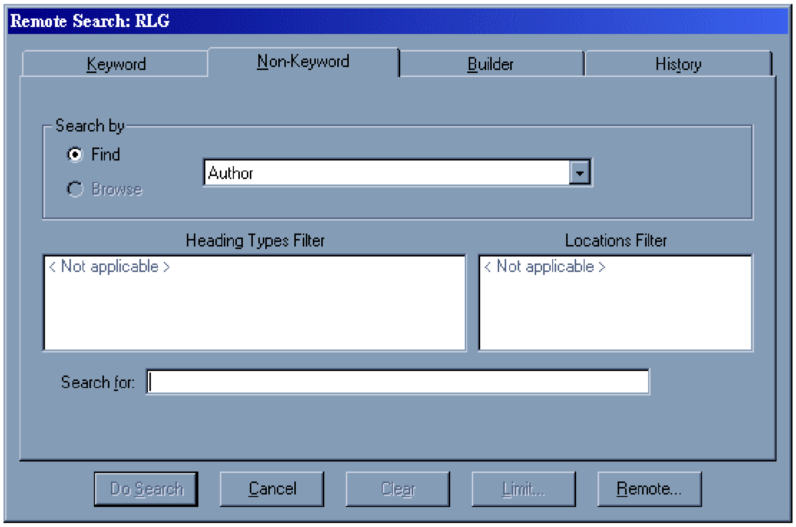

Figure 3-17. Remote Search dialog box

5. Enter the criteria by which you want to search. For detailed information on searching for records in the Cataloging module, see the Search Dialog Box on page 3-28.

NOTE:
Searching for records in other databases, especially if they are non-Voyager databases, may be different from searching for records your local database. For instance, if you are performing a simultaneous search of your local database and a non-Voyager database, only the attributes that the databases have in common as defined in System Administration's Database Definitions display in the **Search by** section of the **Search** dialog box.

Thus, if you are searching a remote database and your local database simultaneously, and the only attribute the two databases have in common is the author attribute, you will only be able to perform a search by author. Additional searching rules apply if you are searching other databases such as connecting to multiple databases disables heading searches.

Z39.50 databases do not support search limits. For more information on simultaneous searching, including setting up search attributes, see the *Voyager System Administration User's Guide*.

6. After you enter your search criteria, click the **Do Search** button (or **Alt + S**). What displays next depends on whether or not you are searching multiple databases or a single database.

NOTE:
If you receive an error message, such as Malformed Query or Search Failed, check your Database Definitions in System Administration module.

The **Search Status** dialog box opens if you are searching more than one database at once. It displays the database name as defined in System Administration and the status of the search such as Searching, Receiving, or Done. See Figure 3-19. The **Stop Search** button allows you to stop the search at any time, if the status of the search is **Searching** or **Receiving**.

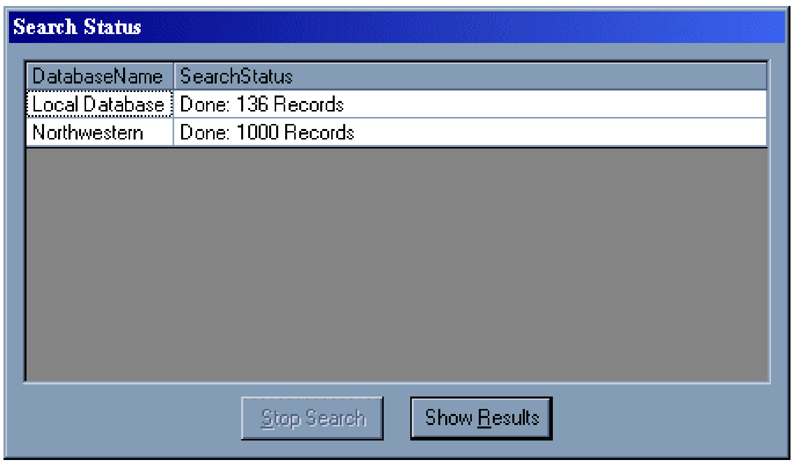

Figure 3-18. Search Status dialog box

To display the search results from the **Search Status** dialog box, click the **Show Results** button. This causes the **Titles Index** dialog box to open with the results for the databases you selected. See Figure 3-19.

If you are searching your local database as well as a remote database(s), the **Titles Index** will display records in the sort order you specify in System Administration, depending on the type of search you performed. See the *Voyager System Administration User's Guide* for details on sort order. If you are searching only remote databases and not your local database as well, the **Titles Index** displays in the sort order specified for the first database you selected in the **Voyager Connection Options** dialog box.

NOTE:
If you are searching more than one database, the **Titles Index** dialog box contains a **Status** button and a **Database** column. Click the **Status** button to bring up the **Search Status** dialog box. The **Database** column lists the name of the database name as established in System Administration.

The **Titles Index** dialog box opens immediately if you are searching only one database. The **Search Status** dialog box does not display at all.

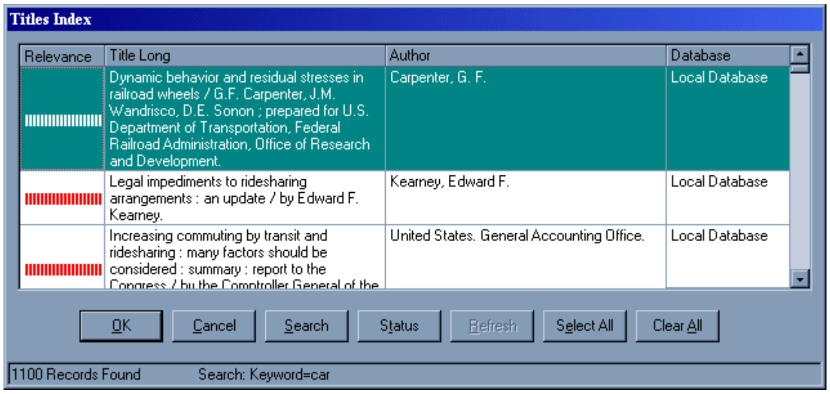

Figure 3-19. Titles Index dialog box

For detailed information on the **Titles Index** dialog box, see Keyword Search Results - The Titles Index on page 3-32.

7. Highlight the record you want to import on the **Titles Index** dialog box (or use the **Ctrl** or **Shift** keys to select more than one), and click **OK** (or double-click the record). The bibliographic record displays (Figure 3-20).

   Click **Cancel** to exit the Titles Index.

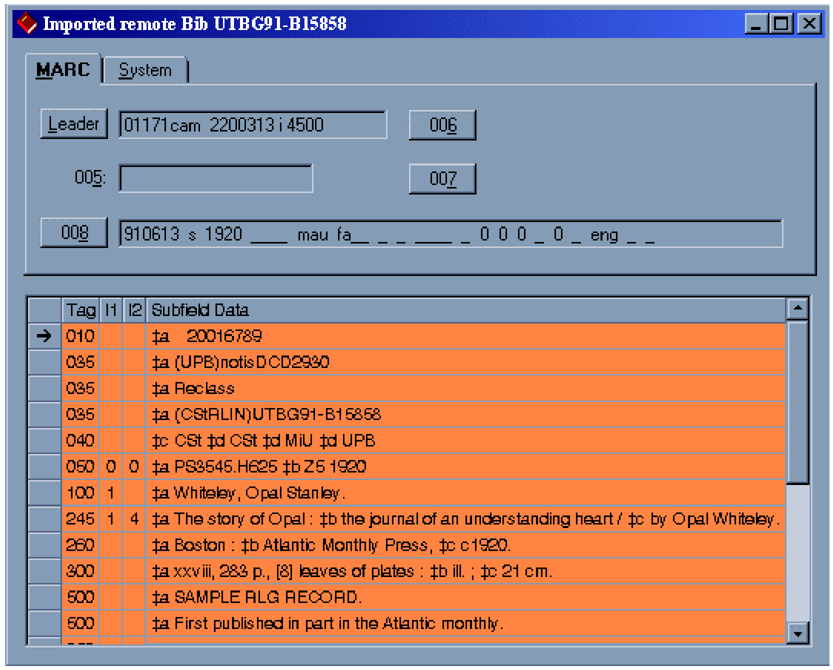

Figure 3-20. Record imported from another database

For details on bibliographic records, see the Bibliographic Recordssection on 2-3.

8. Once the record is imported into your database, you can manipulate it as necessary and save it to your database or to a work file. For detailed information on saving records, see Saving and Printing Information on page 4-5.

NOTE:
The title bar of the bibliographic record indicates that it has been imported. See Figure 3-20. However, once the record is saved to your database, the title bar displays the bibliographic record ID.

After you have searched a remote database, the last search settings defined on the **Voyager Connection Options** dialog box applies until you either change the remote search settings or exit the Cataloging module. Thus, if you want to perform a standard staff-side search of your local database, you must reset your search settings so that only your local database is searched.

To do so, open the **Search** dialog box and click **Remote...**. Press the **Clear** button located toward the center of the dialog box, and then click **Connect**. This connects you only to your local database. In this case, it is not necessary for your local database in the list of **Available Locations** to be selected as a **Selected Location** for this to work. This is because your local database is the default database searched.

Invalid Records

You cannot import records that are invalid from either a file or from a remote database. This is because the system cannot import a record that it cannot read. Generally speaking, the system cannot read a MARC record if its length as defined in the record's first five bytes is incorrect, or if there is a critical element missing in the record such as a field tag displays without a subfield delimiter. If you encounter this situation, you can opt to either fix the record's error such as in the file or manually key the record into the Cataloging module.

RECOMMENDED:
If you attempt to fix the error in the file, we recommend that you re-export the record from your utility and then try the import again.

Alternatively, provided you can associate the import record file with an appropriate application such as Notepad, you can display the record outside of Voyager, diagnose the problem (most likely there are missing field tags, subfield delimiters, end of field marks, and so on), make the necessary corrections, and then import the record. However, unless you are very familiar with MARC and have the available time, it is unlikely that this will be your preferred method. Keying the record into Voyager is generally the easiest and quickest solution for dealing with invalid records.

TIP:
When it comes to invalid records, you should follow your utility's procedures for reporting problems.

Accessing Replaced or Deleted Files

In order to access deleted and discarded files, you must have permission to access the server. Every MARC record imported into Voyager that is either overlaid or deleted gets written to a deleted file; every incoming MARC record that is not added such as a duplicate or canceled is put into a discard file.

Using standard commands for your server, you can access and view the following files (created during the import and delete functions in the Cataloging module). You can FTP these files to the Cataloging client (actually your PC) using standard FTP procedures.

```
deleted.bib.marc
deleted.mfhd.marc
deleted.auth.marc
discard.bib.marc
discard.auth.marc
```

NOTE:
The files produced when you import records through Voyager's Bulk Import batch job have the same names as the files listed above with the exception that `.marc` in the filename is replaced by *`.yyyymmdd.hhmm`*. For details on Bulk Import, see the *Voyager Technical User's Guide*.

Creating New Bibliographic Records from Image Server

If your library has installed Image Server, you can create a new bibliographic record in Cataloging with a link to images. You can specify certain bibliographic information (such as Name, Title, and so on) on the **File Documents** folder and it will be transferred to a new bibliographic record in Cataloging. Bibliographic information is mapped into appropriate MARC fields to images displaying in the **856** fields. From the **File Documents** dialog box in Image Server (Figure 3-21), you can create a new bibliographic record that contains the specified bibliographic information as well as the image link by pressing function keys. See Table 3-2.

Table 3-2. Function Key Options for Creating Bibliographic Records

Function Key	Description
F8	Creates an **856** tag(s) in a open bibliographic record in Cataloging for selected documents.
F9	Creates **856** tags in a open bibliographic record in Cataloging for all documents.
Alt-F8	Creates new bibliographic record in Cataloging for the values in Folder Name and creates **856** tags(s) for the selected document(s).
Alt-F9	Creates a new bibliographic record in Cataloging for the values in Folder Name and creates **856** tags for all the documents in the folder.

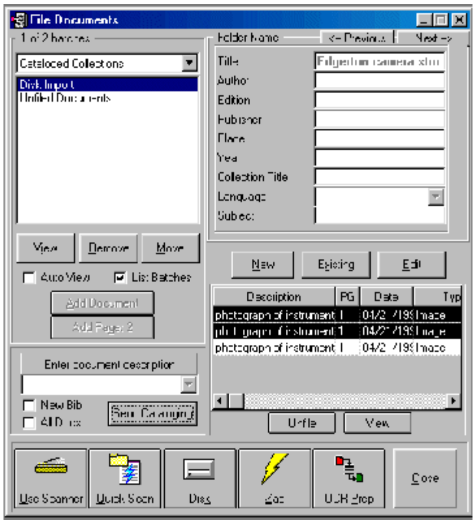

Figure 3-21. File Documents dialog box in ImageServer

When the bibliographic record is created in Cataloging (Figure 3-22), the information from the bibliographic template specified in **Session Defaults** is combined with the information from ImageServer to create the bibliographic record. All of the information from both sources is entered into the record. If there is no bibliographic template specified in **Session Defaults**, Cataloging supplies dummy information in the **Leader** and the **008** fields. This information must then be edited before the record is saved to the database.

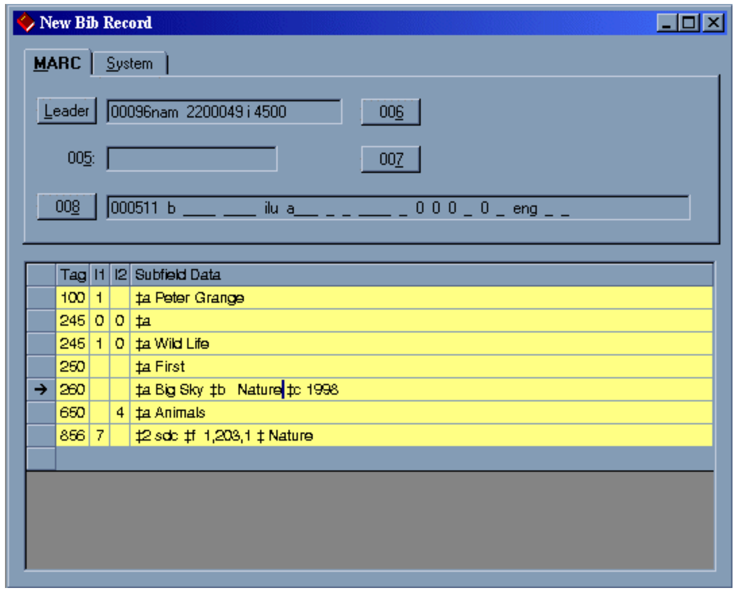

Figure 3-22. New Bibliographic Record in Cataloging

NOTE:
The **Title** field in ImageServer is required. This information is placed into a new **245** field in the new record during the transfer. If the bibliographic template you are using already has a **245** field defined, delete one of the **245** fields before saving the record. You find duplicate fields in your new record if you have certain fields defined in the template and also specify the same information in the **File Documents** dialog box.

Generally, you will have a bibliographic template that is for the purpose of creating records with ImageServer links. Typically, you will want to define a template for the purpose of creating bibliographic records from ImageServer. You would then select this template in your **Session Default**s prior to adding any record.

Duplicate fields will only be detected if you have MARC validation on in **Session Defaults and Preferences** when you save the record. If **MARC Validation** is off, be sure to check the record yourself for any duplications or other errors.

Viewing Information

This section discusses the different methods for viewing information through the Cataloging module such as the following.

- Search dialog box
- Web server http POST
- Line items (Acquisitions in Cataloging)
- Holdings locations
- Linking and Unlinking Records

Search Dialog Box

The **Search** dialog box (see Figure 3-23), available in the Acquisitions, Cataloging, and Circulation modules, provides a unique way to search your library's catalog as well as remote databases. It contains four tabs.

- **Keyword** tab (see Keyword Tab and Keyword Searching on page 3-30)
- **Non-Keyword** tab (see Non-Keyword Tab and Heading and Non-Keyword (Left Anchored) Searching on page 3-36)
- **Builder** tab (see Builder Tab and Builder Searching on page 3-49)
- **History** tab (see History tab on page 3-53)

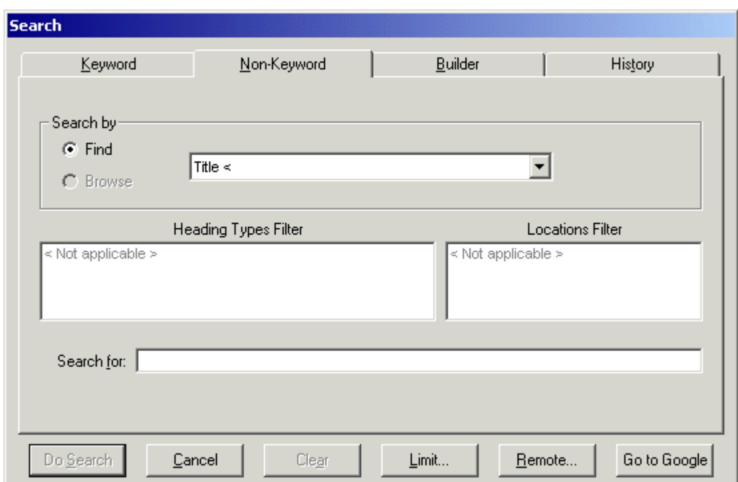

Figure 3-23. Search dialog box

NOTE:
By default, the **Non-Keyword** tab displays when the **Search** dialog box opens. To navigate between search tabs, you can either click the appropriate tab or press the **Alt** key plus the letter underlined in the tab name.

Additionally, if configured, there are two additional features available on each tab regardless of the type of search. These features are remote searching and a user defined search.

Remote Searching

The **Remote...** button enables you to select, connect to, search, and import records from other databases.

The **Remote...** button displays in the **Search** dialog box only if you have defined remote databases to which you can connect in System Administration. See Database Defintions in the *Voyager System Administration User's Guide* for details.

For more information see Remote Databases on page 3-58.

User-Defined Alternate Search Button

Optionally, users can add another button on the **Search** dialog box, providing the capability to invoke a URI (Uniform Resource Identifier) to search outside the Voyager database.

An example of this user-defined feature is shown in Figure 3-24, the button labeled **Google**™ has been set up as a URI search option.

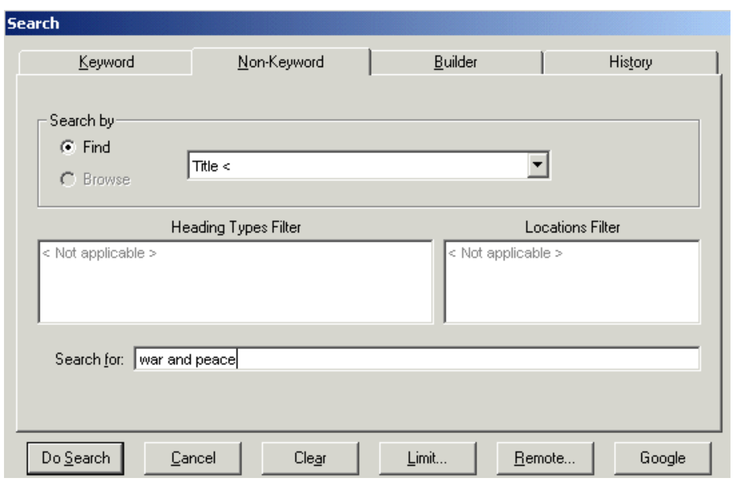

Figure 3-24. Search dialog box with user-defined alternate search button

This alternate search function can be configured to do either of the following.

- Take the text string entered in the **Search for** field and pass it to the alternate search facility to execute when you click this uniquely-defined alternate search button
- Access the search facility without including the text string

The URI search option is defined in the `voyager.ini` file. For more information, about setup for this feature, see the description of the `[SearchURI]` stanza in the `voyager.ini` file located in the *Voyager Technical User's Guide*.

Setting Search Preferences

Users can create session level searching defaults to make it more efficient.

Retain Last Search

Checking the **Retain Last Search** check box causes the search information from your last search to be saved until the current Voyager session is exited. That way, if you want to perform the same search again, you do not have to redefine your search type and text. This check box is found in Cataloging's **Session Defaults and Preferences** work space on the **Work Flow** tab.

Automatic Truncation for Non-Keyword Searches

Checking the **Automatic Truncation for Non-Keyword Searches** check box causes a non-keyword search to be automatically truncated without requiring the question mark for a truncation character. This check box is found in Cataloging's **Session Defaults and Preferences** work space on the **Work Flow** tab.

Display Bibliographic Record Directly If Search Results In Only One Title

Checking the **Display Bibliographic Record Directly If Search Results in Only One Title** check box causes a bibliographic record to display directly (if a search results in only one match), as opposed to having the **Titles Index** list box display from which you can select the bibliographic record.

Keyword Tab and Keyword Searching

The **Keyword** tab (see Figure 3-25) of the **Search** dialog box allows you to do keyword searches of all MARC fields and subfields for your search term(s).

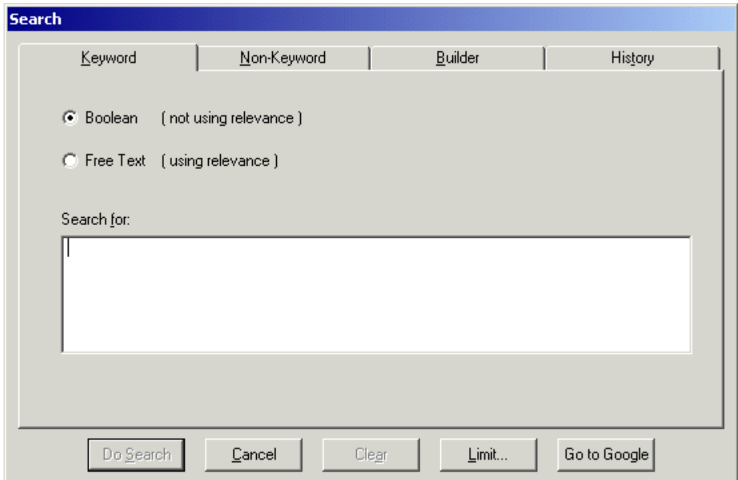

Figure 3-25. Keyword tab of the Search dialog box

Table 3-3 describes the fields and selections on the **Keyword** tab.

Table 3-3. Keyword tab selections

Name	Type	Description
Boolean	Radio button	Searches using Boolean terms, without using relevance. When you select **Boolean**, remember to insert Boolean terms. Otherwise, you will receive a `Malformed Query` error message.
Free Text	Radio button	Searches using relevance, without Boolean operators.
Search for	Text box	Searches term(s) or phrases (using quotation marks) entered here. Use a question mark (**?**) to truncate a search term. Add emphasis to specific terms in a free text search by putting one of the following operators before the term: • + The term must display in the record. • ! Records with the term are to be excluded. • * The term is important.
Do Search	Button	Executes the search.
Cancel	Button	Cancels the search and closes the **Search** dialog box.
Clear	Button	Deletes the search term(s) in the **Search for** text box.

Table 3-3. Keyword tab selections

Name	Type	Description
Limit	Button	Opens the **Search Limits** dialog box, where you can limit your search by language, location, date, or other variables as they relate to your search. See page Search Limits on page 3-54.
Remote...	Button	The **Remote...** button, if configured, allows users to search remote databases. See Remote Databases on page 3-58.
URI Search	Button	If configured, this button invokes a user-defined URI (Uniform Resource Identifier) to search outside the Voyager database.

Keyword Search Results - The Titles Index

A Keyword search returns results in a **Titles Index** dialog box (see Figure 3-26).

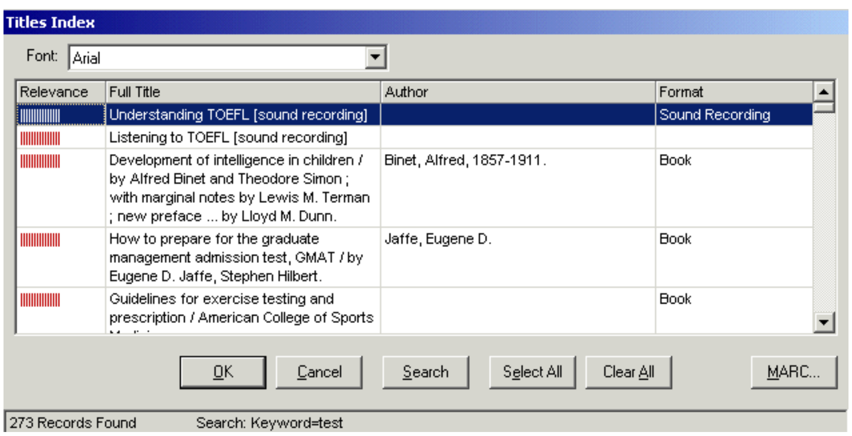

Figure 3-26. Titles Index dialog box

TIP:
*Click the **Titles Index** button (Figure 3-27) or **Display>Title Index** to re-access the results of the most recent Keyword search when the **Titles Index** dialog box is closed.*

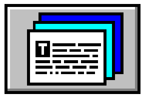

Figure 3-27. Titles Index Button

By default the **Titles Index** dialog box displays the following.

- Title
- Author
- Date
- Relevance column (for free text searches)

Optionally, the title, author, and date columns can be re-configured to display other data on the **Titles Index** dialog box. These columns are configured on the **Indexes Definitions**>**Search Results** tab in the System Administration module. See the *Voyager System Administration User's Guide* for more information.

NOTE:
If your search retrieves more than 100 titles, a **Stop** button becomes active. You can then click the **Stop** button to cancel the retrieval of more records (see Figure 3-28).

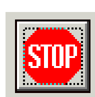

Figure 3-28. Stop button seen with more than 100 search results

Table 3-4 describes the **Titles Index** dialog box.

Table 3-4. Titles Index list box

Name	Type	Description
Font	Drop-down	Select the font used to display text in the **Titles Index** dialog box. **NOTE:** The **Titles Index** dialog box displays the Unicode character set.

Table 3-4. Titles Index list box

Name	Type	Description
Relevance	Column	Displays relevance bars for free text searches.
[Title information]	Column(s)	Columns contain the title information specified when defining searches in the System Administration module (for example, full title, author, and format).
OK	Button	Displays the Bibliographic record's **MARC** tab of the selected record(s).
Cancel	Button	Closes the **Titles Index** dialog box.
Search	Button	Returns to the **Search** dialog box, cleared of previous entries, unless the **Retain Last Search** check box is checked in session preferences.
Select All	Button	Opens all of the returned records.
Clear All	Button	Clears all highlighted titles.

The procedure for performing a bibliographic keyword search is shown in Procedure 3-7, Performing a bibliographic keyword search, on page 3-34.

Procedure 3-7. Performing a bibliographic keyword search

Use the following to conduct a keyword search.

1. From the **Search** dialog box, click the **Keyword** tab.

   Result: The **Keyword** tab opens (see Keyword tab selections on page 3-31 for more information).

2. Select the wanted search option, either the **Boolean** radio button or the **Free Text** radio button.

3. Enter your search term(s) or phrases

   Result: The search can now be executed (see Figure 3-29).

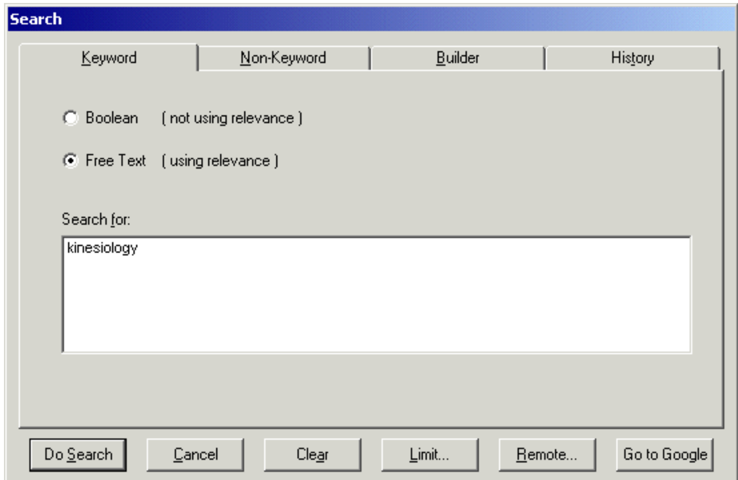

Figure 3-29. Completed Keyword tab

4. Select **Do Search** to execute the search, **Cancel** to cancel the search, **Clear** to delete the search terms, or **Limit** to set limits for this search. See Procedure 3-11, Setting Search Limits, on page 3-56.

   Result: If the search is performed, the **Titles Index** dialog box displays (see Figure 3-30).

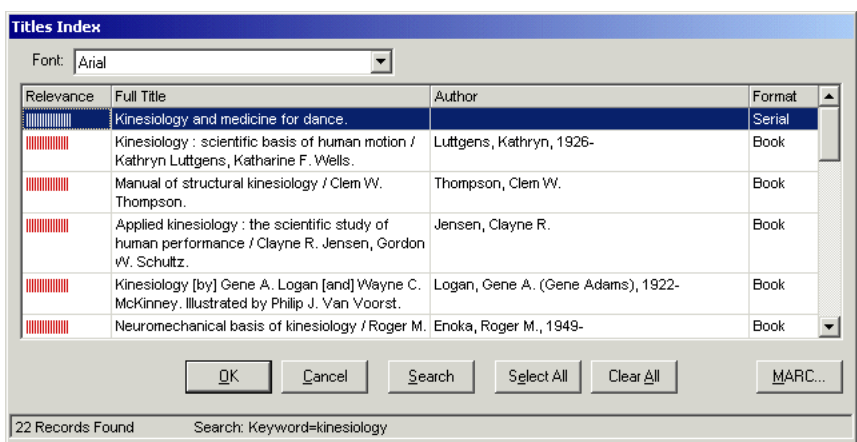

Figure 3-30. Titles Index dialog box after performing a free text keyword search

5. Highlight the title you want and select one of the buttons on the **Titles Index** dialog box. See Titles Index list box on page 3-33 for information on the **Titles Index** dialog box.

   Result: If you clicked the **OK** button, the **MARC** tab of the selected record(s) displays (see Figure 3-31).

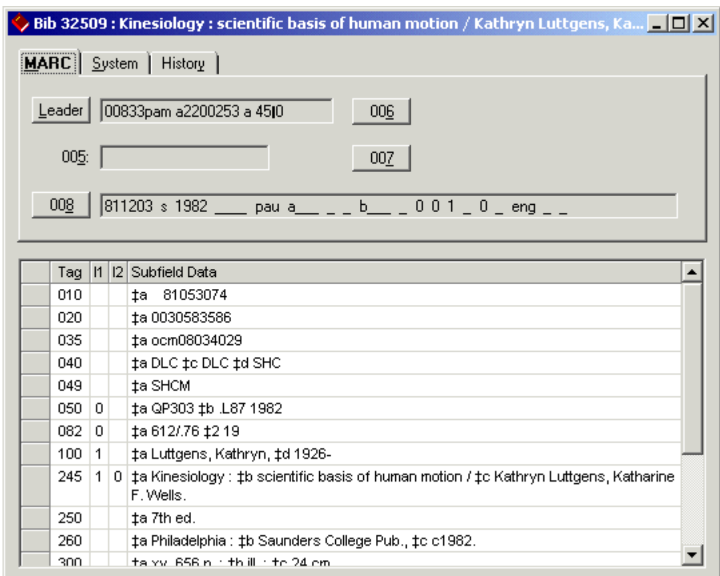

Figure 3-31. MARC tab of the selected title

Non-Keyword Tab and Heading and Non-Keyword (Left Anchored) Searching

Heading/Non-Keyword searching allows users to perform left-anchored bibliographic searches, holdings searches, authorities searches, and heading searches. Your institution defines what searches are available. Search types are created in System Administration. See the *Voyager System Administration User's Guide* for details.

Figure 3-32 displays the **Non-Keyword** tab of the **Search** dialog box.

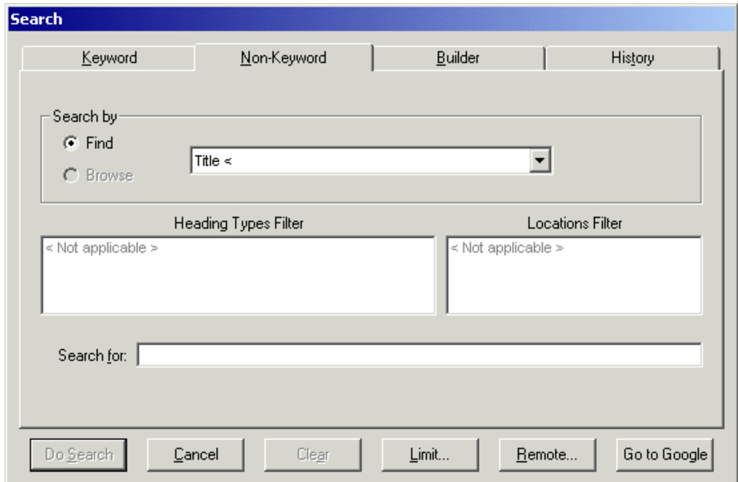

Figure 3-32. Non-Keyword tab

Table 3-5 describes the **Non-Keyword** tab.

Table 3-5. Non-Keyword tab

Name	Type	Description
Search By section		
Find	Radio button	Find searches match specific records of the **Search by** type to the terms entered in the **Search for** field. The result is a finite number(s) of records. See Find and Browse Searches on page 3-38.
Browse	Radio button	Displays an index of headings that can be browsed based on the **Search by** selection, any corresponding filter selections, and a **Search for** value. See Find and Browse Searches on page 3-38.
Search type	Drop-down	Unlabeled field containing a drop-down menu of searches available.
Heading Types Filter	List	Users can select a Heading Type filter to further limit a search. Result records must contain the heading type selected and match the search criteria. **NOTE:** These filters may be suppressed in the System Administration module.

Table 3-5. Non-Keyword tab

Name	Type	Description
Locations Filter	List	Users can select a Locations filter to further limit a search when doing call number searches. Locations are defined in the System Administration module. **TIP:** *By limiting a call number search by location, you can get an online shelf list.*
Search for	Text Box	Enter your search term(s) or phrases (using quotation marks) in the **Search for** field. Use a question mark ? to truncate the search term.
Do Search	Button	Executes the search.
Cancel	Button	Cancels the search.
Clear	Button	Deletes the search term(s) in the **Search for** field.
Remote...	Button	The **Remote...** button, if configured, allows users to search remote databases. See Remote Databases on page 3-58.
Limit	Button	Opens the **Search Limits** dialog box, where you can limit your search by language, location, date, or other variables as they relate to your search. **NOTE:** The **Limits** button is not available for Heading searches. See Search Limits on page 3-54 for more information.
URI Search	Button	If configured, this button invokes a user-defined URI (Uniform Resource Identifier) to search outside the Voyager database.

Find and Browse Searches

The option buttons of either Find or Browse are available if you are performing a heading or call number search. Selecting Find or Browse affects the search results received.

A Find search returns specific, finite results that match the search criteria. For example, a Find subject heading search (Staff Subject Headings Search) for **`war?`** returns the results shown in Figure 3-33. In this example, 339 matching records are found.

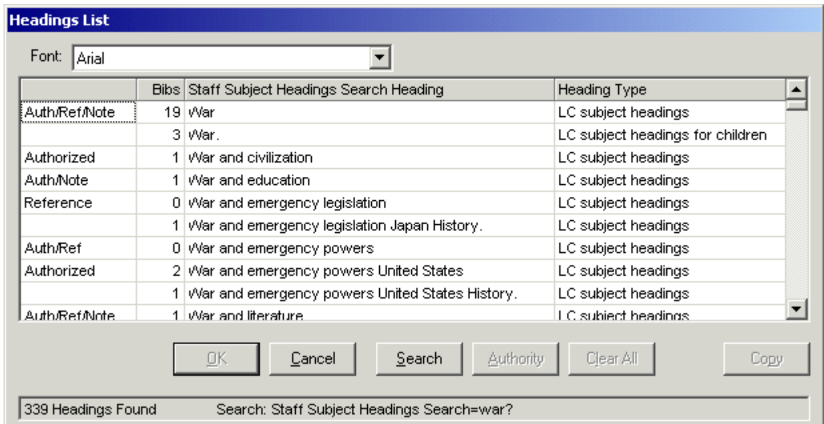

Figure 3-33. Search results after doing find subject heading search for war?

The Browse search allow users to scroll through an institution's list of headings. For example, a browse subject heading search (Staff Subject Headings Search) for **`war?`** returns the results shown in Figure 3-34.

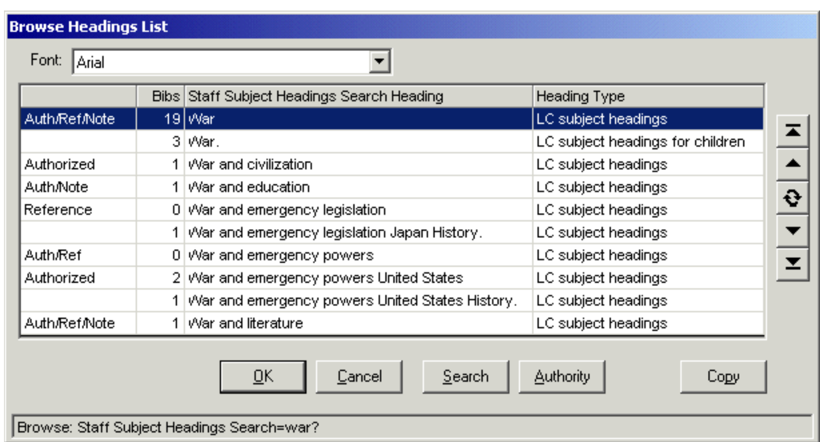

Figure 3-34. Search results after doing a subject heading search for war?

In this example, the system displays the **Browse Headings List** that users can scroll through using the arrow buttons (see Table 3-6 on page 3-42) to find the wanted heading.

Heading Searches by Call Number

When doing a non-keyword search by call number Voyager accepts Dewey call numbers that have more than one decimal point, as well as call numbers that only have a decimal point after the Dewey root/Cutter combination (for example, 305.1 M887 no.2; 506 N56 v.8). Also, normalization of Dewey call numbers including dates was adjusted to ensure proper sorting in call number indexes (for example, 321 A65 1998).

Regarding the display of call numbers with 852|k and 852|m (call number prefix and suffix) fields, you can include prefixes and suffixes in all of Voyager's call number displays.

When you perform a Browse search for a call number with a prefix or a suffix, you see the prefix or suffix in the results list as well as in the actual record itself.

Non-Keyword Search Results - Headings List

Results of a Non-keyword search display in either a **Titles Index** or a **Headings List**. A heading search returns results in a **Headings List** (see Figure 3-35). A left-anchored or non-headings search returns results in a **Titles Index** (see Keyword Search Results - The Titles Index on page 3-32).

In a **Headings List**, users can view References, Ref/Notes, Notes as well as Scope Notes, Narrower terms, See and/or See Also reference(s) associated with the heading.

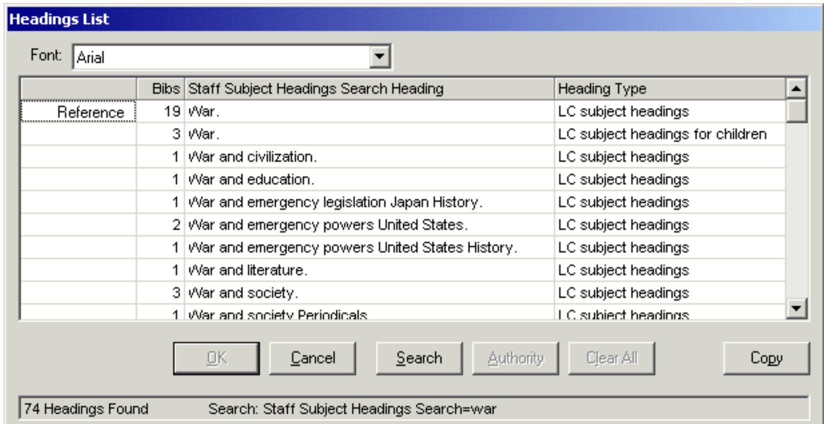

Figure 3-35. Headings List

TIP:
*You can access the **Headings List** by selecting **Display>Headings List** or by clicking the **Headings List** button (Figure 3-36).*

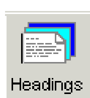

Figure 3-36. Headings List Button

NOTE:
If your search retrieves more than 100 headings, the **Stop** button becomes active. You can then click the **Stop** button to cancel the retrieval of more headings (see Figure 3-37).

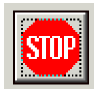

Figure 3-37. Stop button seen with more than 100 search results

Table 3-6 describes the **Headings List**.

Table 3-6. Headings List dialog box

Name	Type	Description
Font	Drop-down	Select the font used to display text in the **Headings List** list box. **NOTE:** The **Headings List** list box displays the Unicode character set.
		Unlabeled column identifying if there are References, Ref/Notes, Notes as well as Scope Notes, Narrower terms, See and/or See Also reference(s).
Bibs	Column	The number corresponds to the number of biblio-graphic records associated with this heading.
Heading	Column	Name of the Heading returned.
Heading Type	Column	Type of heading returned.
OK	Button	Active once a heading is selected. Opens the titles list.
Cancel	Button	Closes the **Headings List**.
Search	Button	Opens the **Search** dialog box.
Authority	Button	Opens the **Reference Information** dialog box. Active if there is a Ref/Note, Reference, or Note, and so on. See Reference Information Dialog Box on page 3-43.
Clear All	Button	Clears the highlighted headings. **NOTE:** Not active with a Browse search.

Table 3-6. Headings List dialog box

Name	Type	Description
Copy	Button	For browse searches only, clicking the **Copy** button copies the contents of the current heading into the clip-board, which may be pasted into the variable fields portion of a MARC record. It is also used when vali-dating a heading. See the *Voyager Cataloging User's Guide*.
Navagation	Buttons 	After a browse search, use these buttons to navigate through the results.

Reference Information Dialog Box

Additional reference information can be displayed for titles that display the following in the **Headings List**.

- Authorized
- Reference
- Note
- Ref/Note

By clicking the **Authority** button (or right clicking the row), the **Reference Information** dialog box opens (see Figure 3-38).

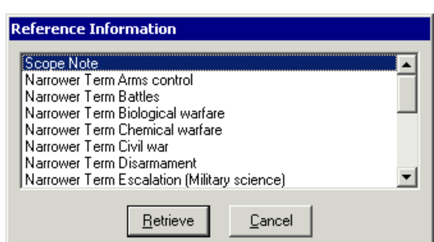

Figure 3-38. Reference Information dialog box

This dialog lists whether authority record information is available as well as Scope Notes, Narrower terms, See and/or See Also reference(s) for the selected heading.

See Table 3-7 for a description of each type of associated information.

Table 3-7. Authorized, Reference, Auth/Ref, and Note Descriptions

Label	Description
Authorized	This term displays if the heading is in the **1XX** field of the authority record.
Reference	This term displays if the heading is not an authorized heading, but is a see from reference from the **4XX** fields.
Auth/Ref	This term displays if the heading is in the **1XX** in an authority record and has references (**5XX** fields) in that same record and/or is itself a cross-reference in another authority record.
Note	This term displays if the heading's authority record contains scope notes. Right-clicking the word Note opens the **Note** dialog box. The label that displays before the text, that is, the word **Note:** or **Search Under** is the scope note label. The scope note label may be edited.

The **Reference Information** dialog box displays its information in order of the type of reference. To retrieve information about one of the references, select the appropriate reference and click the **Retrieve** button. Users can click the **Cancel** button to close the **Reference Information** dialog box and return to the **Headings List** at any time.

Scope Notes

Retrieve the scope notes for the heading by selecting it and clicking the **Retrieve** button (see Figure 3-39).

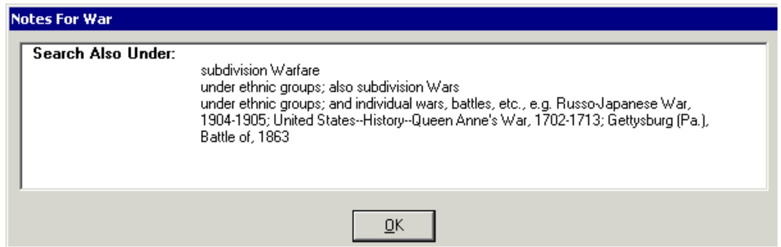

Figure 3-39. Scope Notes for a heading

Narrower Term

Find a narrower term by selecting it and clicking the **Do Search** button (see Figure 3-40).

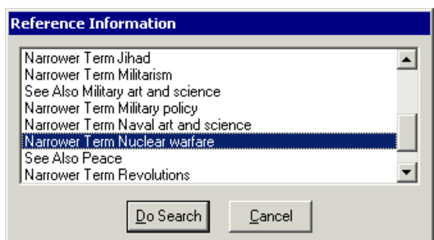

Figure 3-40. Narrower term

The system does a new search for the narrower term (see Figure 3-41).

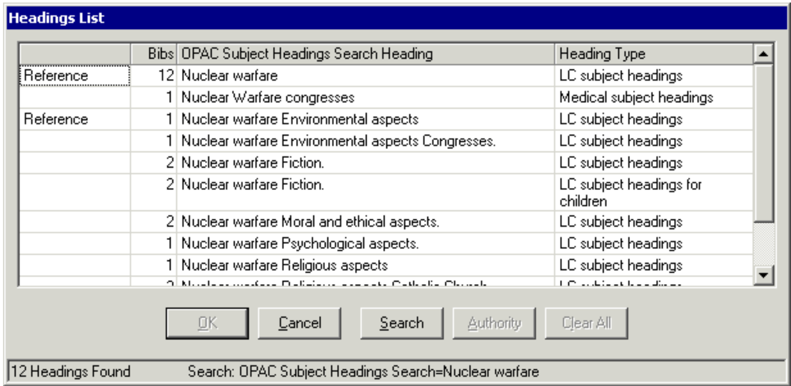

Figure 3-41. Search results from the narrower term

See Also

From the **Reference Information** dialog box, the operator can do a new search for the see also term by selecting it and clicking the **Do Search** button (see Figure 3-42).

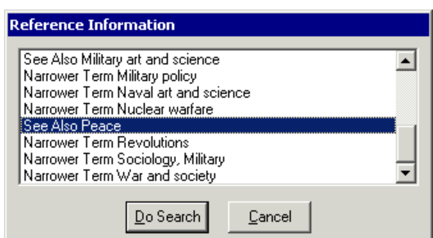

Figure 3-42. See Also

The system then does a new search for the see also term. Figure 3-43 displays the search results of the See Also term.

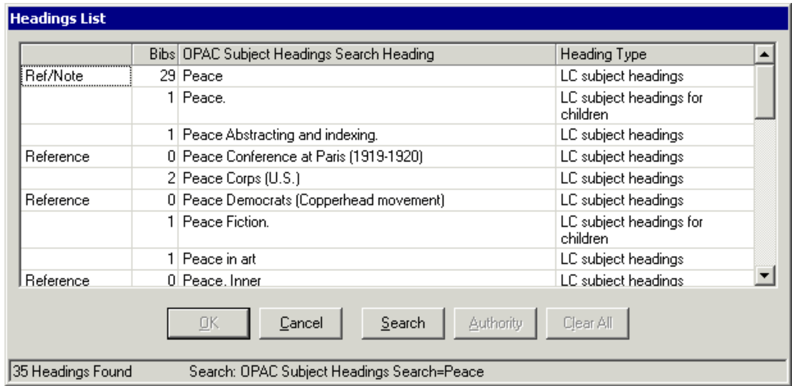

Figure 3-43. See Also search results

The procedure for performing a Non-Keyword search is shown in Procedure 3-8, Non-Keyword searching, on page 3-47.

Procedure 3-8. Non-Keyword searching

Use the following to perform a Non-Keyword search.

1. Access the **Search** dialog box and click the **Non-Keyword** tab.

2. Select the type of search wanted from the drop-down menu (see Figure 3-44).

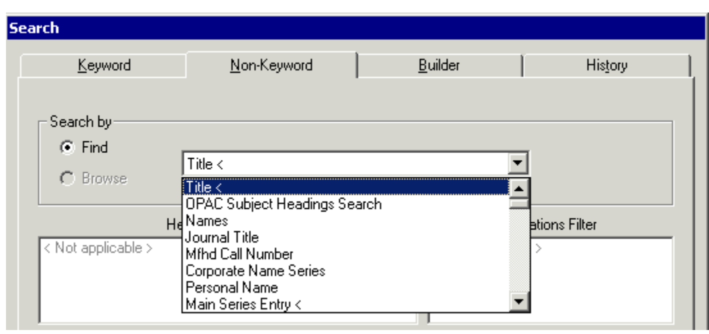

Figure 3-44. Type of search

OPTIONAL:

3. *Select an option button of either **Find** or **Browse** if you are performing a heading or call number search.*

OPTIONAL:

4. *Select a Heading Types Filter (if doing a heading or call number search). Hold the **Ctrl** key down to select more that one filter.*

OPTIONAL:

5. *Select a Locations Filter (if applicable) from the list box(es). Hold the **Ctrl** key down to select more that one filter.*

OPTIONAL:

6. *Click the **Limits** button to display the **Search Limits** dialog box and further limit your search. See Search Limits on page 3-54.*

7. Enter your search term in the **Search For** field (see Figure 3-45).

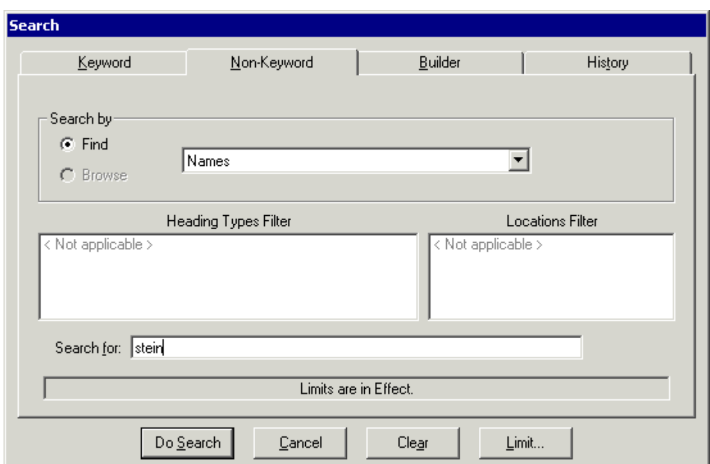

Figure 3-45. Completed Non-keyword tab

8. Click the **Do Search** button to perform the search.

   Result: If you performed a non-heading search, the **Titles Index** list box displays matching titles.

If you performed a heading search, the **Headings List** displays all matching headings. Click the heading that most closely matches what your are searching for, then click the **OK** button (or double-click the heading.) The **Titles Index** list box then displays the matching titles. See Keyword Search Results - The Titles Index on page 3-32.

9. Click the item you want to highlight it in the **Titles Index** dialog box and click **OK**. Optionally, double-click the title to select it. To select all titles, click the **Select All** button.

   Result: The **MARC** tab of the selected record(s) displays.

Builder Tab and Builder Searching

The **Builder** tab of the **Search** dialog box allows you to build complex searches using multiple fields, search terms, and Boolean operators.

Figure 3-46 displays the **Builder** tab of the **Search** dialog box.

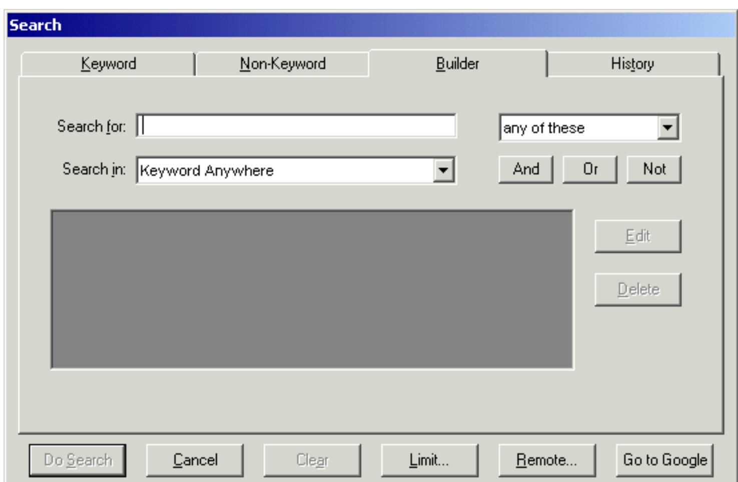

Figure 3-46. Builder tab

Table 3-8 describes the **Builder** tab

Table 3-8. Builder tab

Name	Type	Description
Search for	Text box	Enter your search term(s) or phrases in the **Search for** field.
		Unlabeled drop-down menu allowing the operator to determine how to search. **Any of these** places as implied or between the search terms. **All of these** places as implied and between terms. **As a phrase** searches as if the terms are placed in quotes.
Search In	Drop-down	Contains a drop-down menu of search types.
Boolean	Buttons	Use the **And**, **Or**, or **Not** buttons to conduct a boolean search with additional search criteria.
[Search terms list box]		Unlabeled box containing your search terms and, if used, accompanying Boolean operators.
Edit	Button	Allows you to edit any search term or phrase you select from the unlabeled search term box.
Delete	Button	Deletes any selected search term from the unlabeled search term box.
Do Search	Button	Executes the search.
Cancel	Button	Cancels the search.
Clear	Button	Deletes the search term(s) in the **Search for** field.
Limit	Button	Opens the **Search Limits** dialog box. **NOTE:** The **Limits** button is not available for Heading searches. See Search Limits on page 3-54 for more information.
Remote	Button	The **Remote...** button, if configured, allows users to search remote databases. See Remote Databases on page 3-58.
URI Search	Button	If configured, this button invokes a user-defined URI (Uniform Resource Identifier) to search outside the Voyager database.

The procedure for Performing a Builder search is shown in Procedure 3-9, Performing a Builder search, on page 3-51.

Procedure 3-9. Performing a Builder search

Use the following to perform a Builder search.

1. From the **Search** dialog box, click the **Builder** tab.

   Result: The **Builder** tab opens (see Figure 3-47).

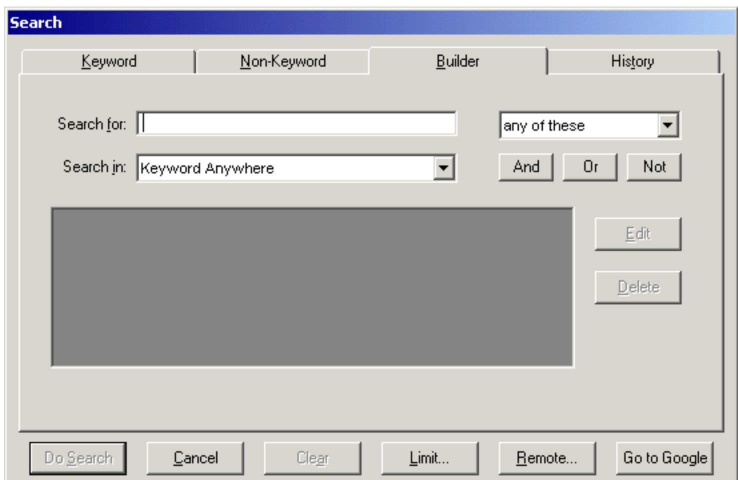

Figure 3-47. Builder search tab

2. Enter a search term(s) or phrase in the **Search for** field.

3. Select the “any,” “all,” or “phrase” option from the drop-down list to the right of the **Search for** field. See Builder tab on page 3-50 for a description of the options.

4. Select a **Search In** field for matching the search terms.

OPTIONAL:

5. *To use multiple search rows, click any of the Boolean operator buttons, **And**, **Or**, or **Not**, then repeat steps 3 - 5.*

Result: The row of search terms displays in the pane below the **Search In** field.

NOTE:
The Boolean operator does not display in the row until you enter another search term and click an additional Boolean operator button (to be used with the next search term, if you enter another).

Figure 3-48 shows a search using multiple search terms in combination with the following.

- All three options for relationships between terms (any, all, phrase)
- Various **Search In** fields (**Title**, the default **Keyword Anywhere**, **Subject**, and **Author Name**)
- Two Boolean operators (**AND** and **OR**)

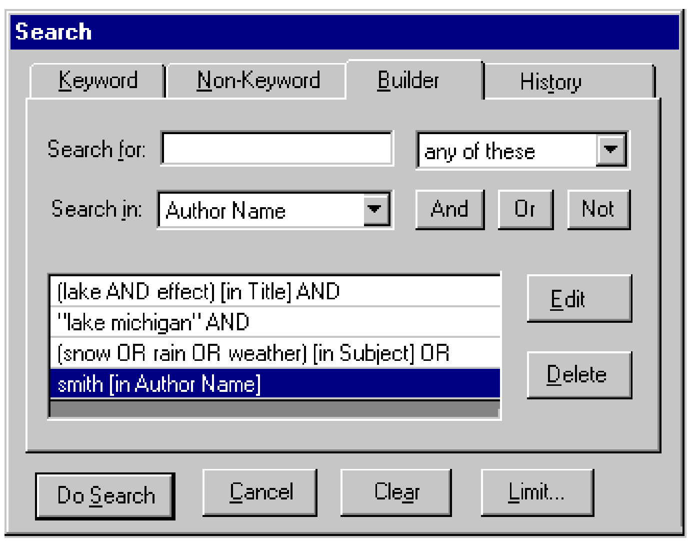

Figure 3-48. Builder tab with multiple search terms and relationships

OPTIONAL:

6. *Edit any row of search terms by clicking the row, then the **Edit** button, then repeating steps 3 - 5.*

   *Delete any row of search terms by clicking the row, then clicking the **Delete** button. Delete the entire pane by clicking the **Clear** button.*

OPTIONAL:

7. *Click the **Limits** button to display the **Search Limits** dialog box and further limit your search. (See Search Limits on page 3-54.)*

8. To search, click the **Do Search** button. (To cancel and close the **Search** dialog box, click the **Cancel** button.)

   Result: The **Titles Index** or **Headings List** displays the results of the search.

History tab

The **History** tab (see Figure 3-49) gives you access to all searches you performed during this session. For each search you performed, it lists the search parameters and the number of records returned (**#Hits**).

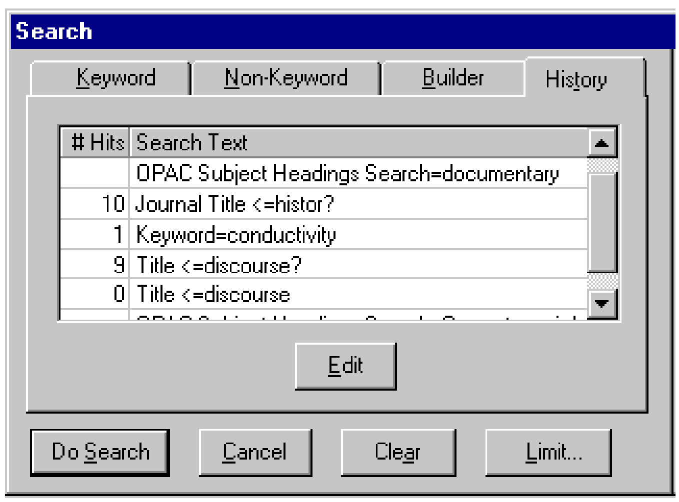

Figure 3-49. Search dialog box, History tab

From the **History** tab, you can re-execute searches previously performed or edit previous search statements.

IMPORTANT:
*The **History** tab does not retain information about search limits. If you re-execute or edit a search from the **History** tab, any current limits in effect are used instead of any limits you previously specified.*

The procedure for accessing searches from the **History** tab is shown in Procedure 3-10, Accessing searches from the History tab, on page 3-54.

Procedure 3-10. Accessing searches from the History tab

Use the following to access a search from the **History** tab.

1. Click the **History** tab from the **Search** dialog box.

   Result: The list of previous searches displays.

2. Click the row of the search you want to access.

   Result: The row is highlighted.

3. (Optional) Click the **Limits** button.

   Result: The **Search Limits** dialog box displays. For information about setting limits, see Search Limits on page 3-54.

4. (Optional) Click the **Edit** button.

   Result: The correct tab opens on the **Search** dialog box and you can edit and re-execute the search from there.

5. Click the **Do Search** button.

   Result: This executes the previous search that you selected.

Search Limits

You can limit your search by Language, Location, Date, Medium, Type, Place, or Status.

Figure 3-50 shows the **Search Limits** dialog box.

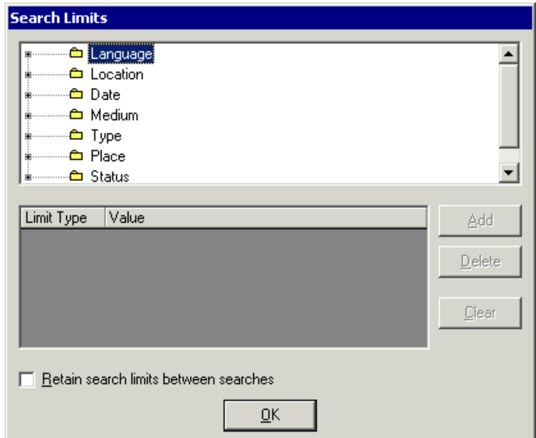

Figure 3-50. Search Limits dialog box

Table 3-9 describes the **Search Limits** dialog box.

Table 3-9. Search Limits dialog box

Name	Description
List of Limits	Types of limits that can be imposed.
Limit Type column	Type of limit selected.
Value	Value of the limit selected. For example, if a language limit is applied, “English” is a possible value.
Add button	Applies the limit selected in the top portion of the dialog box and displays in the bottom portion of the dialog box.
Delete button	Deletes the selected limit from the bottom half of the dialog box.
Clear button	Clears the selected limit from the top half of the dialog box.
Retain search limits between searches	Applies the limit(s) to the current search and all future searches.
OK button	When clicked the system returns to the **Search** dialog box and the search limits defined are in effect.

IMPORTANT:
You cannot limit Subject, Author, or Call Number Headings Searches.

The procedure for setting search limits is shown in Procedure 3-11, Setting Search Limits, on page 3-56.

Procedure 3-11. Setting Search Limits

Use the following to set search limits.

1. Click the **Limit** button to limit your search.

   Result: The **Search Limits** dialog box opens (see Figure 3-51).

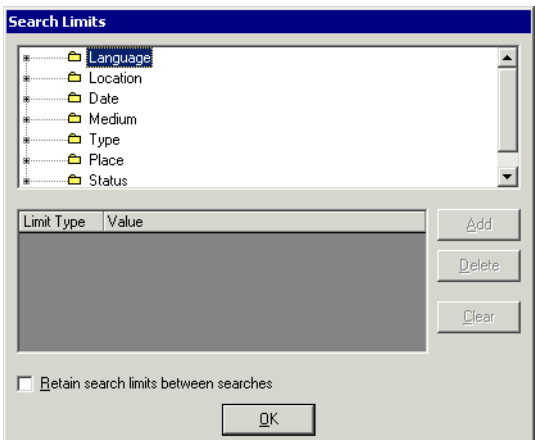

Figure 3-51. Search Limits dialog box

2. Click the plus sign (+) for the limit type you want to select.

   Result: This expands the list and displays the list of limit type values (see Figure 3-52).

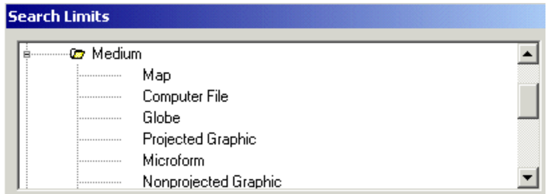

Figure 3-52. Expanded list of limits

3. Select any values from the list you want to use as limits for your search. Figure 3-53 shows the Medium limit of Computer File selected.

NOTE:
The **Add** button is not active until a specific limit is selected.

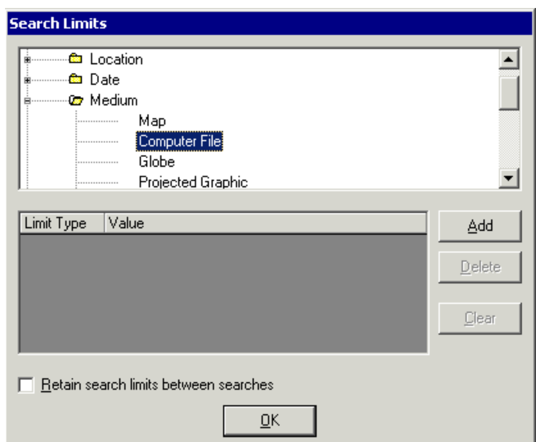

Figure 3-53. Computer file selected as search limit

4. Click the **Add** button (or double-click the value) to add the limit to the list.

   Result: The limit type value you selected displays in the **Limit Type** and **Value** columns (see Figure 3-54).

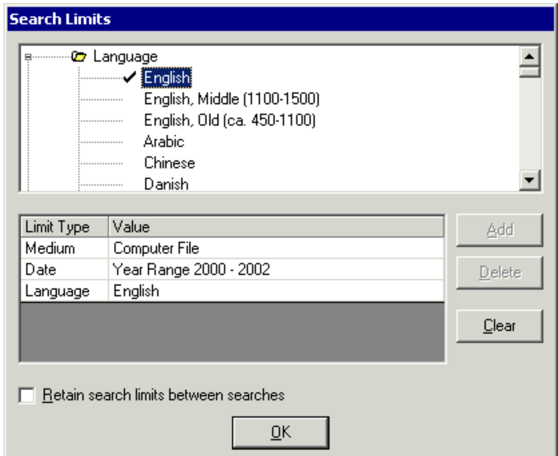

Figure 3-54. Selected search limits listed in the bottom portion of the dialog box

OPTIONAL:

5. *Click the **Retain search limits between searches** check box .*

OPTIONAL:

6. *To edit the limits you have chosen, select a limit type value from the **Value** column and click the **Delete** button to remove the value from the limits to be applied or click the **Clear** button to remove all limit type values from the **Value** column.*

7. Click **OK** to accept the limiting criteria and return to the **Search** dialog box.

   Result: The search limits are set.

Remote Databases

If remote databases are defined in the **Database Definitions** work space of the System Administration module, users can search these databases in the Acquisitions and Cataloging modules. See the *Voyager System Administration User's Guide* for details on defining databases.

You can include your local database in the remote database search which creates a simultaneous search of local and remote databases.

If you have opened the **Search** dialog box and you have set up remote searches in the System Administration module, a **Remote** button displays on the **Search** dialog box (see Figure 3-55).

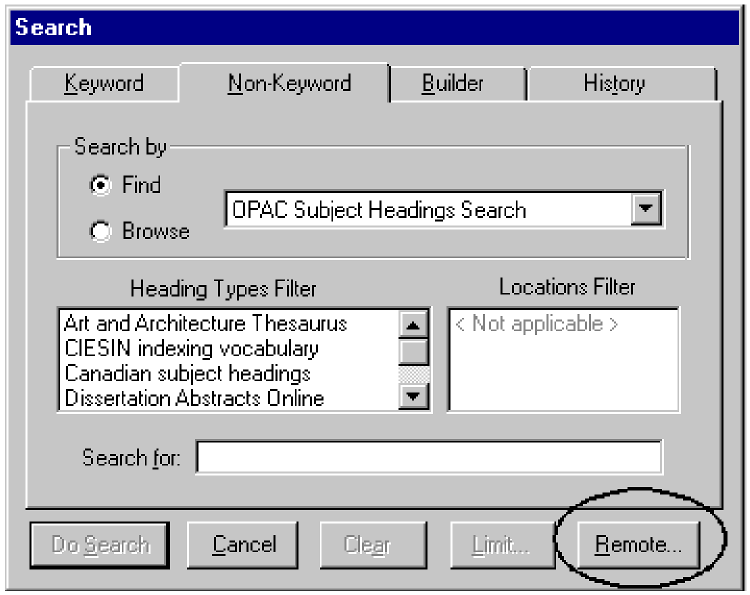

Figure 3-55. Remote button on Search dialog box

When clicked, the **Remote** button opens the **Voyager Connection Options** dialog box (see Figure 3-56).

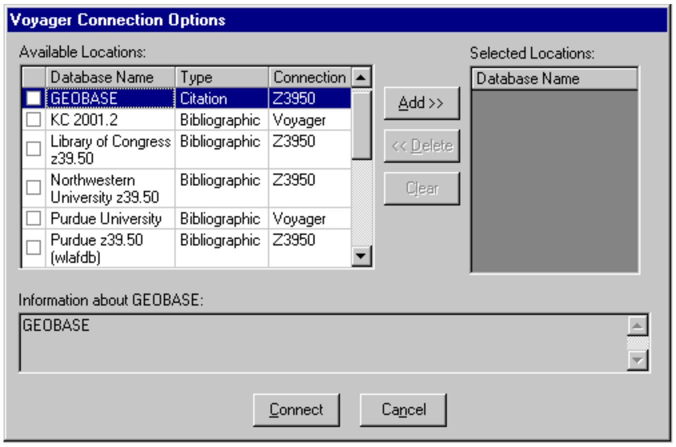

Figure 3-56. Voyager Connection Options dialog box

Use the **Remote...** button to select the remote database(s) from which you want to do the following.

- Search (individually or simultaneously)
- Import records from

The **Voyager Connection Options** dialog box lists the databases you have access to as defined in the System Administration module. The name, connection, and type for the databases are set in the **Database Definition** work space of theVoyager System Administration module.

NOTE:
Your local database is listed.

Table 3-10 describes the **Voyager Connection Options** dialog box.

Table 3-10. Voyager Connection Options dialog box, sections and fields

Section	Field/Column	Description
Available Locations	[Unnamed]	Column of check boxes to the left of **Database Name** indicating whether or not the database has been added to **Selected Locations**.
	Database Name	The name of the database to which you can connect.
	Type	The type of database, such as Bibliographic or Citation.
	Connection	The connection type for the database, such as Voyager or Z39.50.
Selected Locations	Database Name	Lists the databases (by name) that you have selected for searching.
Information about [database name]	[not used]	Describes the database highlighted in the list of **Available Locations**. Description is drawn from the **Database Definition** work space in the Voyager System Administration module.

The procedure for searching remote databases is shown in Procedure 3-12, Searching remote databases, on page 3-61.

Procedure 3-12. Searching remote databases

Use the following to perform a bibliographic search of one or more remote databases.

1. From the **Search** dialog box, click the **Remote** button at the bottom right of the **Search** dialog box or press **Alt** + **R** on your keyboard.

   Result: The **Voyager Connection Options** dialog box opens.

2. From the list of **Available Locations**, click the database(s) to which you want to connect, then click the **Add >>** button (double-clicking the database name in the **Available Locations** also selects it.)

   NOTE:
   If you select more than one database, Voyager searches them simultaneously.

IMPORTANT:
*To search your local database along with remote database(s), select **Local Database** from the list of **Available Locations**.*

Result: Selected locations/databases display in the **Selected Locations** list. A check mark displays in the box directly to the left of the selected database name in the list of **Available Locations** (see Figure 3-57).

OPTIONAL:

3. *To remove a database from the list of **Selected Locations**, highlight the database and click the **<< Delete** button. (You can also double-click the database name in either the list of **Available Locations** or **Selected Locations**.) To remove all the databases from the list of **Selected Locations**, click the **Clear** button.*

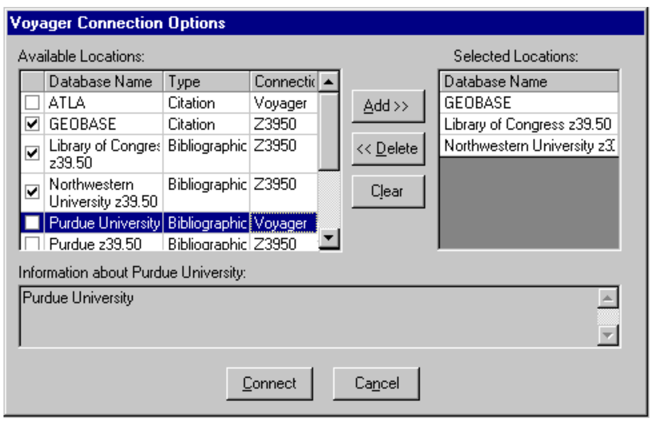

Figure 3-57. Selected locations in the Voyager Connection Options dialog box

4. Click the **Connect** button or click the **Cancel** button.

   Result: If you clicked the **Connect** button, one of the following dialog boxes opens.

   - If you are connecting to one database, the **Remote Search** dialog box opens (see Figure 3-58) with the name of the database displayed in the title bar. If available from the remote server, the same search types are available as those in the regular local search display.

Figure 3-58. Remote Search dialog box, Search by options

- If you are connecting to more than one database, the **Simultaneous Search** dialog box opens (see Figure 3-59). The types of searches available are limited to those shared by all connected databases.

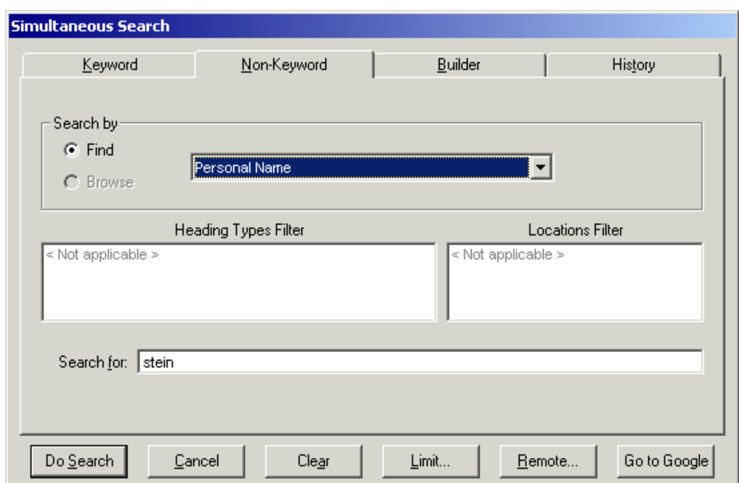

Figure 3-59. Simultaneous Search dialog box

If you clicked the **Cancel** button the **Voyager Connection Options** dialog box closes without connecting to a remote database.

IMPORTANT:
Searches on remote and multiple databases are limited to search types available to all connected databases. Other limits may apply. For instance, connecting to multiple databases disables heading searches, and Z39.50 databases do not support search limits.

For more information on simultaneous searching, including setting up search attributes, see the *Voyager System Administration User’s Guide*.

5. Enter your search criteria.

   Table 3-11 lists the page numbers where you can find information about performing various searches.

   Table 3-11. Page references for bibliographic search types

Type	Page
Keyword	3-30
Non-Keyword	3-36
Builder	3-49
History	3-53

6. Click the **Do Search** button.

   Result: One of the following occurs.

   - If you are performing a single-database search, the **Titles Index** list box opens with results from the search.
   - If you are performing a simultaneous search, the **Search Status** dialog box opens (see Figure 3-60), listing each database name and the status of each search. The **Stop Search** button displays if your search returned over 100 hits. It allows you to interrupt the search if the status is **Searching** or **Receiving**.

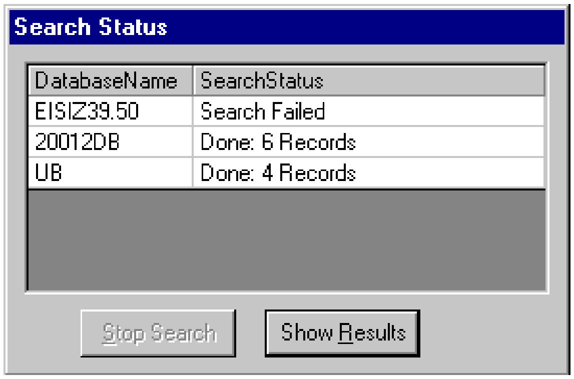

Figure 3-60. Search Status dialog box

- For simultaneous searches, click the **Show Results** button to view the results in the **Titles Index** list box (see Figure 3-61).

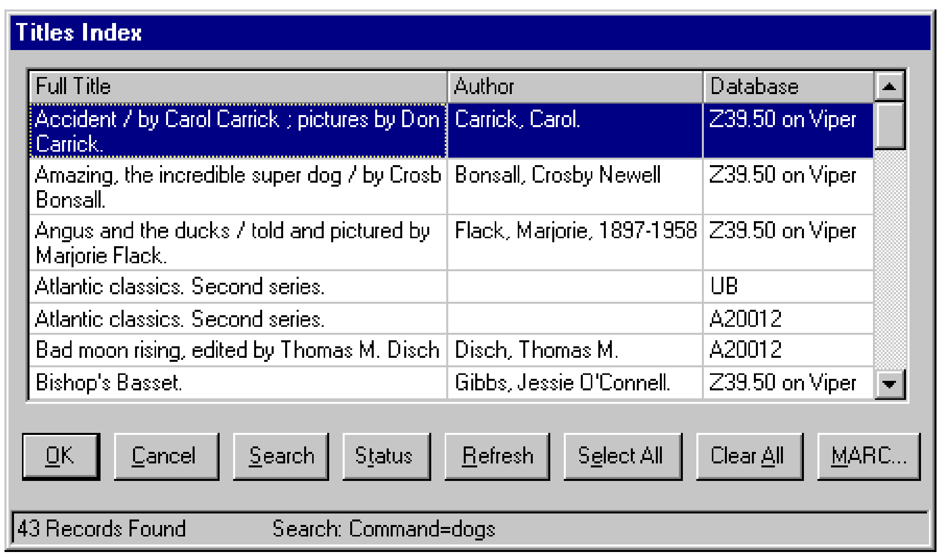

Figure 3-61. Titles Index following a simultaneous search

TIP:
*For searches combining local and remote databases, the **Titles Index** displays records in the sort order specified in the System Administration*

*module. If you are searching only remote databases, the **Titles Index** displays records in the sort order specified for the first database in the **Voyager Connection Options** dialog box. See the Voyager System Administration User's Guide for details on sort order.*

NOTE:
For simultaneous searches, the **Titles Index** list box contains a **Status** button and a **Database** column. The **Status** button opens the **Search Status** dialog box of the last search. The **Database** column lists the name of the database as established in the System Administration module.

7. From the **Titles Index** list box, to select one or more items, click the row(s) containing the item(s).

8. Use one or more of the following buttons to continue and complete the search.

Use...	to...
OK	add the item(s) you selected to the purchase order, close the **Titles Index list** box, and view the line item(s) in the **Purchase Order** dialog box.
Cancel	cancel the search and close the **Titles Index** dialog box.
Search	close the **Titles Index** list box and return to a new **Search** dialog box.
Status	open the **Search Status** dialog box of the last search.
Refresh	refresh the index in the event that records were updated in the Cataloging module.
Select All	select all of the records in the search results list.
Clear All	de-select all selected records.

NOTE:
The connections you select in the **Voyager Connection Options** dialog box remain throughout the session unless you change them. To do so, click the **Remote...** button from the **Search** dialog box and de-select/select new databases.

Additional Options for Displaying a Record - Web Server http POST

You can display an active bibliographic or holdings record from Cataloging in WebVoyáge for example using an http POST request to send a MARC record to a web server. This is an optional feature that is set in the `voyager.ini` file with the `[MARC POSTing]` stanza. For more information regarding setup, see the *Voyager Technical User's Guide*.

See Procedure 3-13, Display Record in WebVoyáge - Example, on page 3-67 for an example of displaying an active bibliographic or holdings records from the Cataloging module in WebVoyáge

Procedure 3-13. Display Record in WebVoyáge - Example

Use the following to display an active bibiliographic or holdings record in WebVoyáge.

1. Search and open a bibliographic record in the Cataloging module.

   Result: This makes the bibliographic record active.

2. (Optional) Click **Get Holdings**.

   Result: This makes the holdings record active.

3. Click Record > Send Record To > WebVoyáge. See Figure 3-62.

   Result: This displays the active record in WebVoyáge.

NOTE:
The active record can be determined by the highlighted Title Bar.

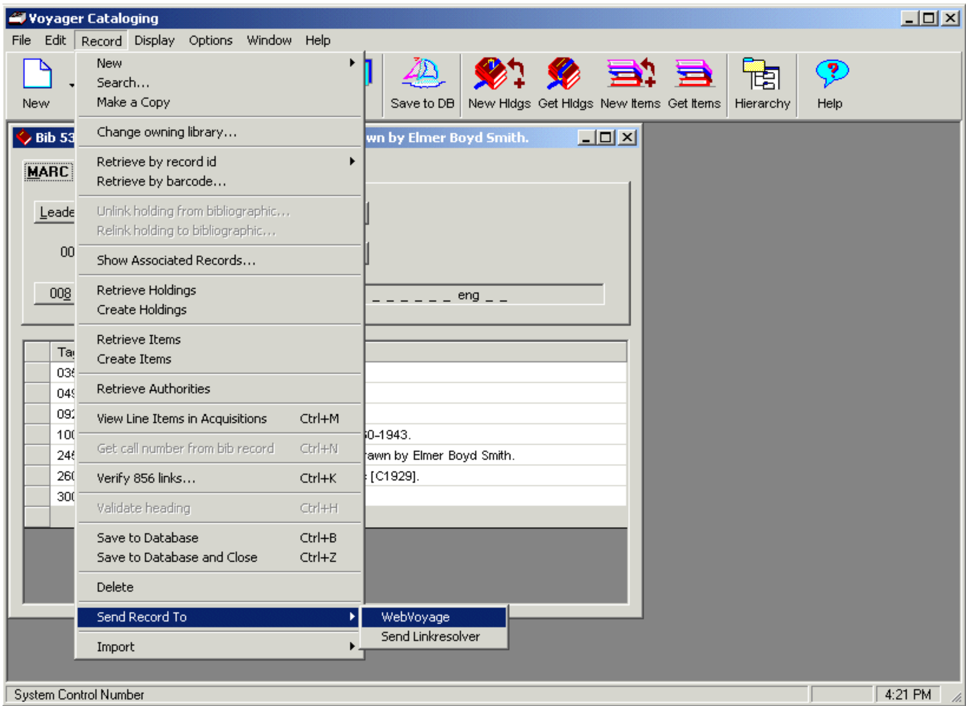

Figure 3-62. Send Record To WebVoyáge

Viewing and Editing Line Items (Acquisitions in Cataloging)

The Cataloging in Acquisitions or Cat in the Acq feature allows you to view and edit a bibliographic record in the Cataloging module from a line item in the Acquisitions module. See the *Voyager Acquisitions User’s Guide* for details on Cat in the Acq.

In order to improve workflow even further, the Acquisitions in Cataloging or Acq in the Cat feature provides the second half of the two-way communication between the Acquisitions and Cataloging modules. Acq in the Cat allows you to pull up and edit a line item in the Acquisitions module from the associated bibliographic or holdings record in the Cataloging module. In this way, you can view all of the information related to a specific title without performing any additional searching, thereby saving valuable time and effort.

System Administration Setup

In order to use the Acq in the Cat feature, there is only one System Administration configuration you need to set. This configuration pertains to Acquisitions security permissions. Specifically, the operator(s) established in System Administration that you want to use the Acq in the Cat feature, must have at least view-only access to line items in Acquisitions. If the operator(s) does not have at least view-only access to line items in Acquisitions, they will not be able to use the Acq in the Cat feature. In fact, the menu option in the Cataloging module that facilitates Acq in the Cat functionality is grayed out. See 3-70 for more details on the Acq in the Cat feature.

You establish view-only access (or add/update and/or delete access) to line items in Acquisitions on the **Profile Values** tab of the appropriate Acquisitions/Serials Profile Definition in the System Administration module. See Figure 3-63. To access the **Profile Values** tab of an Acquisitions/Serials Profile Definition, select **Applications>Security** from the System Administration main menu, or click the **Security** button. The **Voyager Security Configuration** dialog box opens. Click the **Acq/Serials Profiles** button, select the profile for which you want to set permissions, and click the **Profile Values** tab.

For detailed information about setting permissions in Acquisitons/Serials Profile Definitions, see the "Securing Your System>Acquisitions/Serials Profile Definitions" section of the *Voyager System Administration User's Guide*.

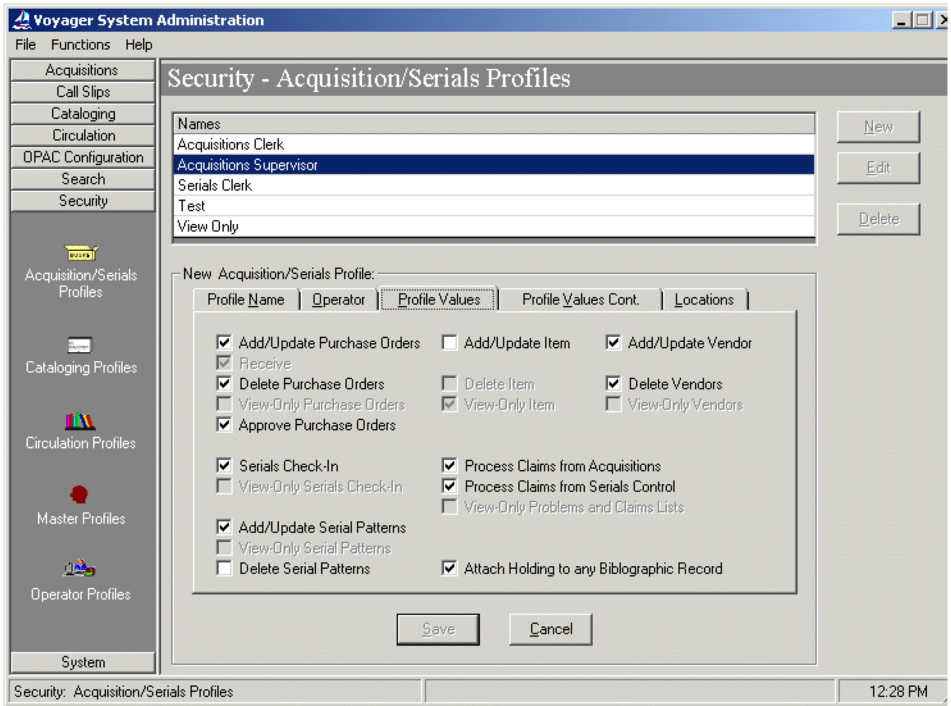

Figure 3-63. Establishing at least view-only access to line items in Acquisitions

The procedure for using the Acq in the Cat function is shown in Procedure 3-14, Using the Acq in the Cat Function, on page 3-70.

Procedure 3-14. Using the Acq in the Cat Function

Use the following steps to work with the Acq in the Cat function.

1. Log into both the Cataloging and the Acquisitions modules using the same **User ID** and **Password**.

   If you are *not* logged into both modules, an error message displays. See Figure 3-64.

Figure 3-64. Error message if not logged into both modules

If you are logged into Cataloging and Acquisitions with different **User IDs** and **Passwords**, an error message opens. See Figure 3-65.

Figure 3-65. Error message if logged into modules with different User IDs and Passwords

2. Open a bibliographic or holdings record In the Cataloging module. See Opening a Record on page 3-8 for details on opening records.

   Result: The record opens. See Figure 3-66.

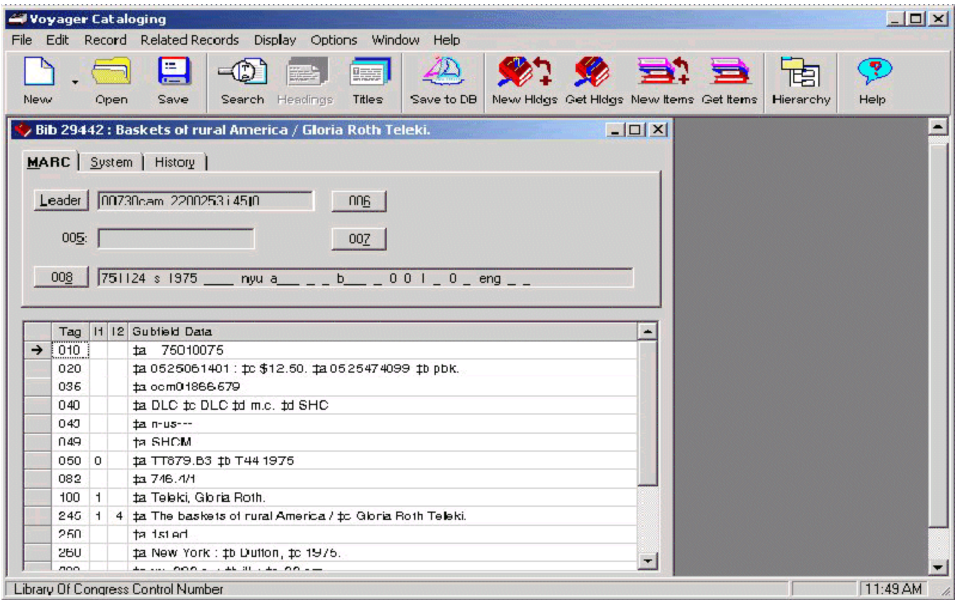

Figure 3-66. Example of a bib record opened for using Acq in the Cat

3. Select **Record>View Line Items in Acquisitions** (see Figure 3-66), or use the **Ctrl + M** keystroke. Depending on whether the number of line items associated with the record, the result will be different.

   Result: Line items open through Acq in the Cat function. Once the line item is up in the Acquisitions module, you can view and manipulate it in standard Acquisitions fashion. See the *Voyager Acquisitions User's Guide* for details on line items.

NOTE:
If you have not established at least view-only access to line items in Acquisitions (in the System Administration module) for the operator(s) using the Acq in the Cat function, the **View Line Items** in Acquisitions menu option will be grayed out. See 3-69 for more information on setting at least view-only access to line items in Acquisitions.

A Single Line Item

If there is one line item associated with the record you opened, selecting **Record>View Line Items in Acquisitons** (or **Ctrl + M**) will cause the Acquisitions client to display with the record's associated line item.

NOTE:
Line items are directly associated with bibliographic records, as opposed to holdings records, in Voyager. Thus, using Acq in the Cat from a holdings record will cause the line item to display that is associated with the holdings record's related bibliographic record. This is because holdings and bibliographic records are linked in the Voyager system.

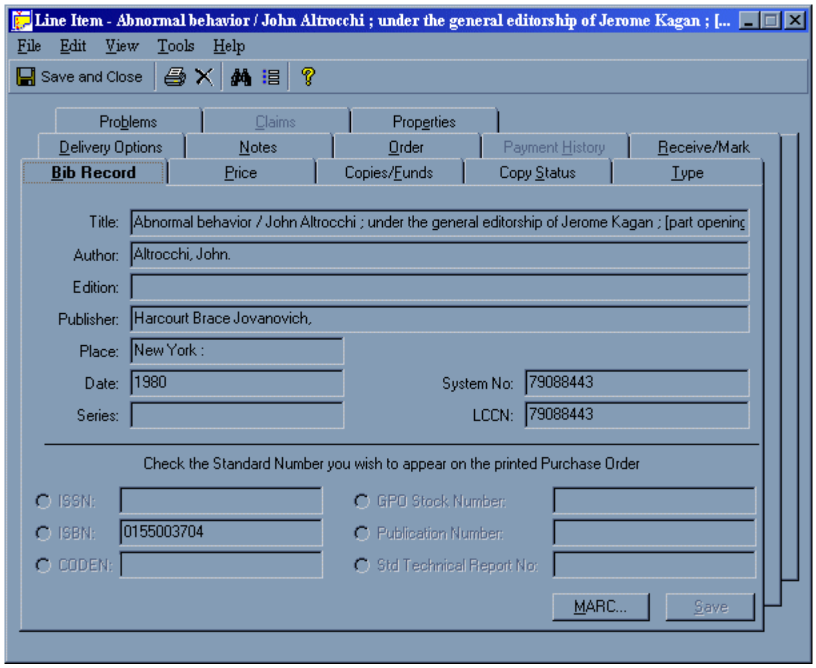

Figure 3-67. Line item that displays in the Acquisitons module

Multiple Line Items

If more than one line item is associated with the record such as the same title has multiple purchase orders or if one line item was created per copy, selecting **Record>View Line Items in Acquisitons** (or **Ctrl + M**) causes a dialog box to display in Acquisitions, summarizing all of the line items associated with the bibliographic record (see Figure 3-68). This summary is broken down into the following 8 pieces: **Line #/Status**, **Title**, **# Copies**, **Location(s)**, **Funds**, **Line Item Type**, **Notes**, and **PO #**. From this dialog box, you can view (and edit) the line item of your choice by highlighting it and clicking the **Details...** button.

TIP:
To save you time and effort, the dialog box summarizing the line items will not close (even if you pull up a line item) until you press the ***Close*** *button. That way, you do not have to go back into Cataloging and repeat the steps for viewing line items in Acquisitions.*

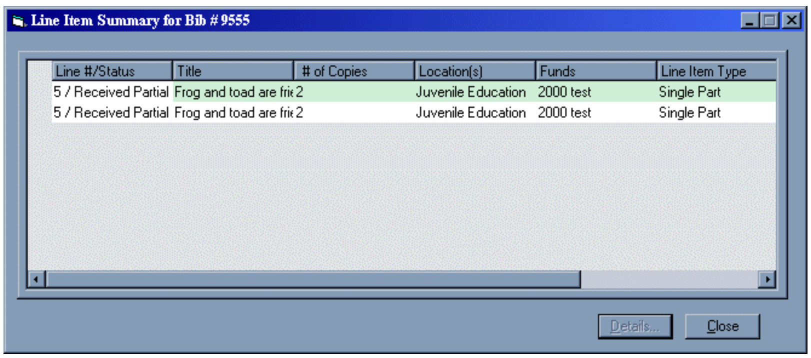

Figure 3-68. Dialog box for multiple line item matches in Acquisitions

No Line Items

If the record you opened does not have any associated line items, selecting **Record>View Line Items in Acquisitions** (or **Ctrl + M**) will cause the following error message to display in Cataloging (see Figure 3-69).

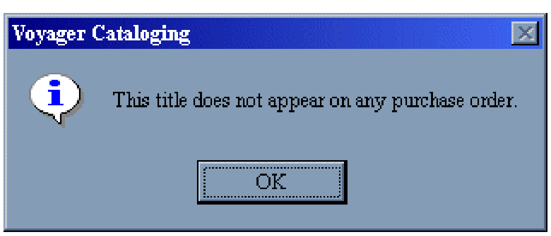

Figure 3-69. Message associated line items do not exist

4. Save your changes or exit when you are finished viewing the item in Acquisitions.

Retrieving Records Associated with Other Records

You can retrieve records that are related to other records. Depending on what type of record is the active record, you can retrieve records by selecting the appropriate command from the **Record** menu. See Table 3-12.

You can also retrieve records by clicking the appropriate toolbar button.

Table 3-12. Retrieve Options Using Record Menu

Record Type	Able to Retrieve
Authority	None
Bibliographic	Authority, Holdings, or Item
Holdings	Items
Items	Holdings

You can also view all of the associated records by selecting **Record>Show Associated Records** (or click the **Hierarchy** button). From the **Holdings and Items for** dialog box you can select which associated record you want to retrieve.

- The procedure for retrieving holdings is shown in Procedure 3-15, Retrieve Holdings, on page 3-75.
- The procedure for retrieving authorities is shown in Procedure 3-16, Retrieve Authority, on page 3-77.
- The procedure for retrieving items is shown in Procedure 3-17, Retrieve Items, on page 3-77.

The procedure for retrieving holdings is shown in Procedure 3-15, Retrieve Holdings, on page 3-75.

Procedure 3-15. Retrieve Holdings

Use the following to retrieve holdings.

1. Select **Record>Retrieve Holdings** or click the **Retrieve Holdings** button (Figure 3-70).

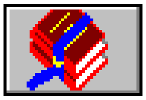

Figure 3-70. Retrieve Holdings Button

Result: If there is only one holdings record associated with the active bibliographic record, the holdings record opens.

If the bibliographic record has more than one holdings record associated with it, the **Retrieve Holdings** dialog box opens (Figure 3-71).

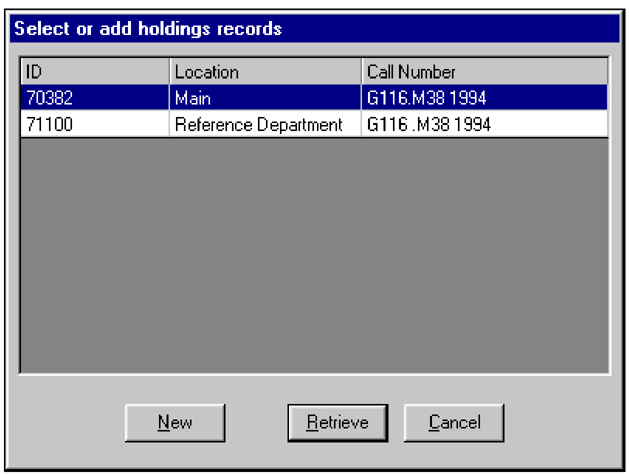

Figure 3-71. Retrieve Holdings dialog box

This dialog box lists the **ID**, **Location**, and **Call Number** for all the holdings records attached to the active bibliographic record.

2. Click **New**, **Retrieve** (after selecting record to retrieve), or **Cancel**.

   Result: You can enter a new record, view (retrieve) a selected record, or exit from this dialog box.

The procedure for retrieving authority records is shown in Procedure 3-16, Retrieve Authority, on page 3-77.

Procedure 3-16. Retrieve Authority

Use the following to retrieve authority records.

1. Select **Record>Retrieve Authorities**.

   Result: The **Select one or more authority records** dialog box opens (Figure 3-72), listing record numbers and names for all the authority records attached to the active bibliographic record.

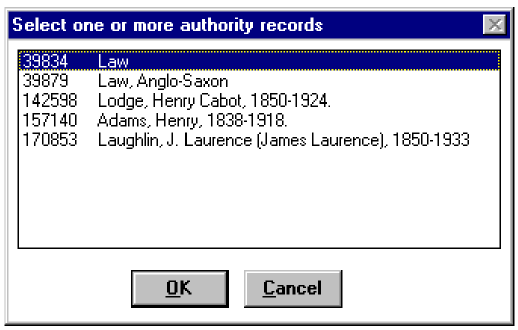

Figure 3-72. Select one or more authority records dialog box

2. Select the record(s) that you want to view and click **OK**. Click **Cancel** to close the dialog box without retrieving any records.

The procedure for retrieving items is shown in Procedure 3-17, Retrieve Items, on page 3-77.

Procedure 3-17. Retrieve Items

Use the following to retrieve items.

1. Select **Record>Retrieve Items** or click the **Retrieve Items** button (Figure 3-73).

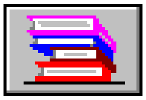

Figure 3-73. Retrieve Items Button

Result: The **Retrieve Items** dialog box opens (Figure 3-74).

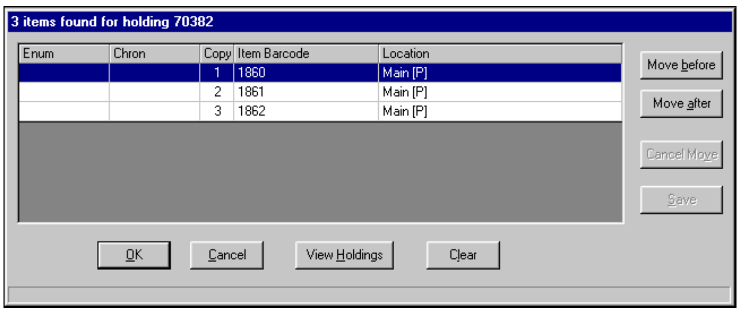

Figure 3-74. Retrieve Items dialog box

From this dialog box you can open the item record(s), open the respective holdings record, or resequence the items if there are more than one. For any of the following activities, click the **Clear** button to unselect all of the selected items.

Each item's location is designated as a permanent location or a temporary location. A permanent location is indicated by a capital P in parentheses **(P)** after the location name. A temporary location is indicated by a capital T in parentheses **(T)** after the location name.

2. To open the item record(s, highlight the Item record(s) that you want to view (or double-click an Item record) and click **OK**. Click **Cancel** to close the dialog box without retrieving any records.

3. To open the holdings record, highlight the appropriate Item record and click the **View Holdings** button.

4. To resequence the items, perform the following steps. Resequencing items allows you to determine in which order items display in other modules.

   a. Highlight the item(s) you want to resequence.

b. Click the **Move Before** button (cursor changes to an up arrow) or the **Move After** button (cursor changes to a **down arrow**), depending on where you want to move the item. Click **Cancel Move** to cancel the move without resequencing the items.

c. Point to and click the item you want to move the other item(s) before or after. The items are resequenced.

d. If you want this order to display every time this list is displayed, click the **Save** button then click the **Cancel** button to close the **Retrieve Items** dialog box.

e. Click the **Cancel** button *before* clicking the save button to close the dialog box without saving the new sequencing order of the items.

Viewing Holdings Locations

To list all locations for which you are authorized, select **Edit>Show Holdings Locations** (or press **Ctrl-L**). The **Holdings Locations** dialog box opens (Figure 3-75).

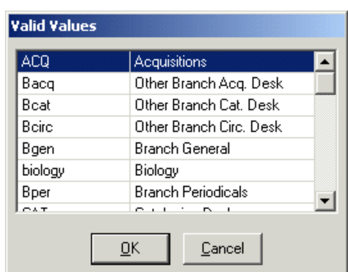

Figure 3-75. Show holdings Valid MARC Values dialog box

You must be in the subfield data field of a Holdings record to access this dialog box. This command displays all holdings locations and their abbreviations for your security access level. You can use this dialog box to change or add a location to a holdings record. Place your cursor after the subfield b marker, display the valid values (**Ctrl + L**), highlight a location and click **OK** (or double-click a location).

Linking and Unlinking Records

With the Cataloging module, you can link an item to multiple bibliographic records in order to accommodate a bound with situation. The ability to link bibliographic records and item records depends upon which type of record the active record is. See Creating and Opening Records on page 3-1 for more information.

Link Item to Bib

The procedure for linking items to bibliographic records is shown in Linking Items to Bibliographic Records on page 3-80.

The procedure for linking items to bibliographic records is shown in Procedure 3-18, Linking Items to Bibliographic Records, on page 3-80.

Procedure 3-18. Linking Items to Bibliographic Records

Use the following to link items to bibliographic records.

1. Select **Record>Link to bibliographic**.

   Result: The **Link the item to a bibliographic record** dialog box opens (Figure 3-76).

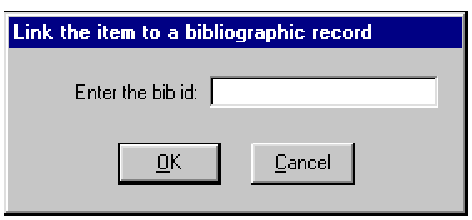

Figure 3-76. Link the item to a bibliographic record dialog box

2. Type the appropriate bibliographic ID in the text box. The bibliographic ID is displayed in the title bar of the bibliographic record.

3. Click **OK** to link the item record to the bibliographic record; click **Cancel** to close the **Link an item to bibliographic record** dialog box without linking the records.

NOTE:
The ability to link bibliographic and item records in the Record menu is disabled if the system focus is not on a bibliographic or item record from the database. It also doesn't work if the focus is on a bibliographic record from the database but the bibliographic record has existing holdings. In such a case, linking an item to the bibliographic record is not allowed because an existing item would already be linked to a holdings record either for this bibliographic record or another one.

Relink an Item to a Different Holdings

If an item record is the active record, you can specify a specific holdings record to re-link the current item record to.

NOTE:
Relinking an item to a different holdings will remove the link between the current item and the original holdings.

The procedure for relinking an item to a different holdings is shown in Procedure 3-19, Relink an Item to a Different Holdings, on page 3-81.

Procedure 3-19. Relink an Item to a Different Holdings

Use the following to relink an item to a different holdings.

1. Select **Record>Relink to a different holding**.

   Result: The **Relink the item to a holding record** dialog box opens (Figure 3-77).

Figure 3-77. Relink the item to a holding record dialog box

2. Type the appropriate holdings ID in the text box. The holdings ID is displayed in the title bar of the item record.

3. Click **OK** to link the item record to the specified holdings record. Click **Cancel** to close the **Relink the item to a holding record** dialog box without linking the records.

   NOTE:
   The ability to relink an item to a different holdings in the Record menu is disabled if the system focus is not on a item record from the database.

Unlinking Holdings and Bib Records

With the Cataloging module, you can unlink a holdings record from multiple bibliographic records in order to eliminate a bound with situation.

NOTE:
This command is only available when a holdings record that is attached to multiple bibs is the active record.

The procedure for unlinking holdings and bibliographic records is shown in Procedure 3-20, Unlinking Holdings and Bib Records, on page 3-82.

Procedure 3-20. Unlinking Holdings and Bib Records

Use the following to unlink holdings and bibliographic records.

1. Select **Record>Unlink holding from bibliographic.**

   Result: The **Linked Bib Records** dialog box opens.

2. Select the bibliographic ID that you want to unlink the holdings record from.

   Result: The bibliographic ID is displayed in the title bar of the bibliographic record.

3. Click **OK**, or click **Cancel**.

   Result: This unlinks the bibliographic record from the holdings record or closes the dialog box without unlinking the records.

NOTE:
The ability to unlink an item from a holdings in the Record menu is disabled if the system focus is not on a item record from the database.

Copying an Item Record from an Existing Item Record

You can copy an item record from an existing item record as long as the item record is in the database (like copying MARC records). However, the barcode and template information are not copied to the record. In **Session Preferences**, the **Item Defaults** tab allows you to complete a template-like preference so that when you copy item records, information is already entered for your record.

Changing, Saving, and Printing Information

4

Contents

Contents

Changing, Saving, and Printing Information

4

Changing Information

This section describes the following.

- How to edit existing records in the Cataloging module
- Alternatives for saving a record
- Printing options

Editing a Record

Before you can edit a record, you must first open the record. For more information, see Opening a Record on page 3-8.

The procedure for editing a record is shown in Procedure 4-1, Editing a Record, on page 4-1.

Procedure 4-1. Editing a Record

Use the following to edit a record.

1. Display the record that you want to edit. (See Opening a Record on page 3-8 for more information.)

2. Edit the record by changing the following.

   - Leader
   - Fixed fields
   - Variable fields

   For more information on these fields, see the section about that particular record type in Bibliographic Records on page 2-3, Authority Records on page 2-28, and Holdings Records on page 2-36.

   To edit a record, you can use the same commands as you use for editing a template. See Edit Menu on page 10-20 for more information.

3. Save the record with one of the following commands: **Save**, **Save As...**, or **Save to Database**. (See Saving a Record on page 4-5 for more information.)

NOTE:
If you cut and paste information from a different application (such as Microsoft Word), the following characters are stripped out. See Table 4-1.

Table 4-1. Character Changes

Character	ASCII Code
tab	ASCII 09
carriage return	ASCII 0D
line feed	ASCII 0A
subfield delimiter	ASCII 1F
end of field character	ASCII 1E
end of record character	ASCII 1D

Bibliographic Records

When you edit the bibliographic level and/or type of record in the **Bibliographic Leader**, a dialog box opens warning you about the incompatibility of the **008** to this changed record. If you click **No** or **Cancel**, the changes you made to the **Bibliographic Leader** will not be saved. If you click **Yes**, the changes will be saved and the incompatible portion of the **008** field displays. You can then make the changes to the **008** field.

Deleting a Record

You can delete a record from the database by selecting **Record>Delete**.

The procedure for deleting a record is shown in Procedure 4-2, Deleting a Record, on page 4-3.

Procedure 4-2. Deleting a Record

Use the following to delete a record.

1. Display the record from the database that you want to delete. (See Search Dialog Box on page 3-28 for more information.)
2. Select **Record>Delete**.
3. Click **OK**, or click **Cancel**.

   Result: This deletes the record or closes the confirmation dialog box without deleting the record.

NOTE:
You cannot delete a bibliographic record that has holdings records attached to it, and you cannot delete a holdings record that has item records attached to it. You also cannot delete a record that has other transactions pending against it. This includes records that are checked out to patrons in the Circulation module or purchase orders in the Acquisitions module.

When you delete a record, it is saved on the server in a file called delete.*<recordtype>*.marc, where *<recordtype>* is the type of record being deleted (either bib, mfhd, or auth). For example, if you delete a bibliographic record, it is saved in the file delete.bib.marc. To access the deleted files on the server, contact your system administrator.

When item records are deleted, key pieces of item information are automatically archived in a log file called item.delete. This file is intended for audit and statistical purposes. If necessary, this file may be used to manually recreate items in Voyager.

Adding a URL to an 856 Field

You can automatically insert an **856** field with a URL in it into your record. Voyager automatically adds the URL on view in your web browser into a new **856** field in the record currently open in Cataloging. If you do not run Netscape or Explorer, this function may not work properly.

The procedure for adding a URL to an 856 field is shown in Procedure 4-3, Adding a URL to an 856 Field, on page 4-4.

Procedure 4-3. Adding a URL to an 856 Field

Use the following to add a URL to an 856 field.

1. Open up your web browser and pull up the Web site whose URL you want to add.

2. Open the record (or create a new record) into which you want to insert the URL.

3. Select **Edit>Insert URL from Browser** or click **Ctrl** + **U**.

   Result: The URL will be added to a new **856** field in the record. You can then edit the new **856** field if necessary.

Change Owning Library

Owning libraries are assigned to locations in System Administration. Institutions must specify that bibliographic records belong to an owning library. When a user logs into Cataloging, they must select a cataloging location, which is associated with an owning library, from a list determined by their security clearance. Depending on the security clearance and on the cataloging location selected, the user will (or will not) be able to view, update, add, or delete records from various owing libraries.

The procedure for changing the owning library is shown in Procedure 4-4, Changing Owning Library, on page 4-4.

NOTE:
This assumes that you have the appropriate security clearance to perform this change.

Procedure 4-4. Changing Owning Library

Use the following to change the owning library.

1. Display the bibliographic record that you want to change the owning library for.

2. Select **Record>Change Owning Library** from the Cataloging toolbar.

3. Select the appropriate owning library and click **OK**. Click **Cancel** to close the **Select an Owning Library** dialog box without changing the owning library.

   If a Cataloging Location is selected that has no associated owning library, the user will be unable to add, edit, or delete any bibliographic record.

Saving and Printing Information

This section describes the process for saving and printing information.

Saving a Record

To save a record, you can select from the following toolbar options.

- File>Save
- File>Save As
- Record>Save to Database
- Record>Save to Database and Close
- Record>Save to Database and to Local File
- Record>Save to Database and to Local File and Close

Because Cataloging works with records in two locations, the database and work folders, it is important to understand where records are saved. You can always determine in which work folder a record is saved by using **File>Save As**.

NOTE:
Records saved to the databased are validated based on the options chosen on the **Validation** tab of Session Defaults and Preferences. See Validation Tab (Figure 10-2) on page 10-4 for more information.

Save

You can save an active record or a template to a file in a work folder by selecting **File>Save** or click the **Save** button (Figure 4-1). This command tries to save the current record or template to the same work folder from which the record was opened. If the record was opened from a work folder, it is saved to the same work folder. However, if the record was retrieved from the OPAC, Voyager asks you to name the record or template and save it in a work folder. To save a record to a different location, use the **Save As** command.

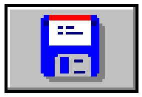

Figure 4-1. Save Button

When a record is saved to a work folder, it is not validated against authority records or the MARC tag table. Also, because the **Suppress From OPAC** check box is not a part of the MARC 21 record, that information is not saved when the record is saved as a work record. Each time that you retrieve a work record in order to save it to the database, the **Suppress From OPAC** check box must be marked appropriately.

In addition, if a record is saved to a work folder and then opened in another Cataloging session for a different database, the record overlays any existing record without any duplicate checking. This is because Voyager automatically overlays any record with an identical **001**. The correct procedure is to Import the record into another database.

Update Record Alert

If you modify a record and save it and Voyager discovers that the record has been modified by another user while you had the record open, Voyager displays an *Update Record Alert* message (Figure 4-2). This alert is activated for changes made to any record types except for item records. Changes to item records do not set off this alert.

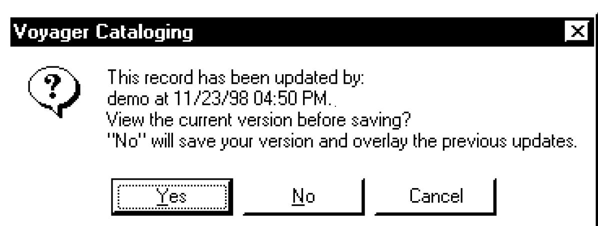

Figure 4-2. Update record alert dialog box

If there have been changes made, the following three options are available.

- To save your changes over the changes in the database (the **No** button).
- To cancel your changes and preserve what is already in the database (the **Cancel** button).

- To view the record in the database (the **Yes** button). In that case, you will be able to view the current database version of the record and combine the information into your record to your satisfaction, and then save the final version of your record back to the database.

Save As...

You can save a record to a work folder (a file) at a different location by selecting **File>Save As...**. When you select **Save As...**, Voyager saves the record to a new location and/or with a new name. If the record was opened from a work folder, you can use **Save As** to save the record in the following ways:

- Appended to an existing work record
- To the same work folder as a new record
- To a different work folder

If the record was retrieved from the database, use **Save As** to save the record to a work folder.

In addition, if a record is saved to a work folder and then opened in another Cataloging session for a different database, the record will overlay any existing record without any duplicate checking. This is because Voyager automatically overlays any record with an identical **001**. The correct procedure is to Import the record into another database.

Save to Database

You can save a record to the database in the following ways.

- Select **Record>Save to Database**.
- Click the **Save to Database** button (Figure 4-3).
- Press **Ctrl+B** on your keyboard.

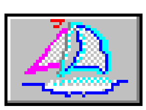

Figure 4-3. Save to Database button

In addition, you can save a record to the database and then have the record automatically close by selecting **Record>Save to Database and Close**, or by pressing **Ctrl+Z** on your keyboard. If you are saving a record to the database via the **Save to Database and Close** function and a different process interrupts the save and close such as Authority Validation or Duplicate Detection, the record is closed once you elect to continue with the save, provided that the save is successful.

In order to save a record to the database, you need the proper security level. When saving a record to the database, Cataloging first validates the record against the MARC tag tables (see MARC Tag Tables on page A-1) and the Authority records, (see Authority Control on page 9-1).

Cataloging then checks for duplicate records. A confirmation message displays upon the successful saving of the record. If you want to save the records in your current session to the database without running MARC or Authority Control Validation, you can change the settings on the **Validation** tab in your Session Defaults and Preferences (see Validation Tab (Figure 10-2) on page 10-4).

If you do not want a confirmation message to display upon the successful saving of a record to the database, you can change the **Suppress confirmation message upon successful save** option on the **Work Flow** tab in your Session Defaults and Preferences (see Work Flow Tab (Figure 10-4) on page 10-8).

NOTE:
Before you can save a holdings record to the database, you must define the 852 subfield b with a valid location code as defined in System Administration and assigned to the appropriate Cataloging Policy and Cataloging Security Profile.

Once a holdings record is saved to the database, the title of the associated bibliographic record is displayed on the title bar of the holdings record, and on the **BibTitle(s)** tab.

When an existing record with a record status of new, such as when the **Bibliographic Leader** is set to n, is edited and saved to the database, the record status is automatically changed to corrected or c.

When a record retrieved from an existing work file is saved to the database and it has an 001, it is treated as an existing record. Cataloging updates the record with a matching 001 in the database. When a record does not have an 001, it is treated as a new record.

When a newly-copied, newly-imported, or newly-created record is saved to the database, Voyager checks for any duplicates in the database and if any are detected, the **Bibliographic Dedupe Detection** dialog box opens (Figure 4-4). This lists all of the records that are found to be duplicates according to the rules in the System Administration module. For information on duplicate matching, see the "Bibliographic Duplicate Detection Profile" section of the *Voyager System Administration User’s Guide*.

NOTE:
If any single index in the duplicate detection hierarchy is matched to more than 1000 records, all duplicate detection stops. Only the first 100 records above the matching threshold are returned to the client.

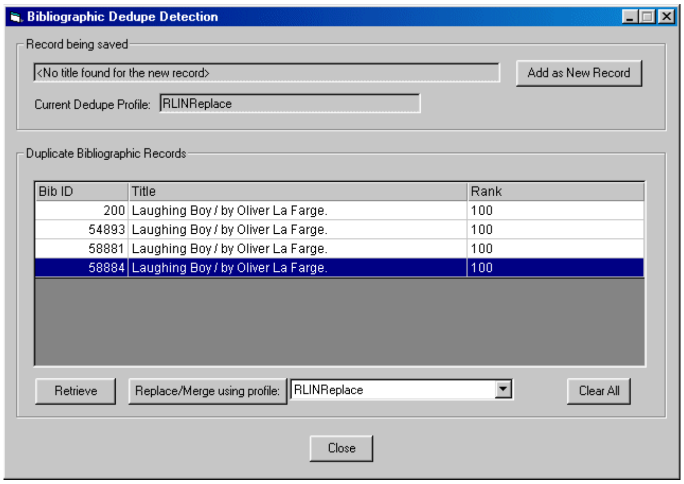

Figure 4-4. Bibliographic Dedupe Detection dialog box

- You can view the MARC record of any of the duplicates by selecting a record from the list and clicking **Retrieve**. Click **Clear All** to deselect all of the selected records in the list.
- To add the record to the database as a new record overriding the existence of duplicates, click **Add As New Record**.
- If you want the incoming record to replace or be merged with one of the records in the list, use Procedure 4-5, Replace/Merge Incoming Record, on page 4-9.

The procedure for replacing or merging an incoming record with a record from the Bibliographic Dedupe Detection dialog box is shown in Procedure 4-5, Replace/ Merge Incoming Record, on page 4-9.

Procedure 4-5. Replace/Merge Incoming Record

Use the following to replace or merge incoming records.

1. Make sure that the target record in the list and only the target record is highlighted.

2. Click the **drop-down arrow** to select with which replace or merge profile you want to import. This list only includes Replace or Merge profiles.

3. Click the **Replace/Merge using profile:** button. No more duplicate checking is performed, and the record is replaced or merged according to the profile selected.

   When you save a record to the database for the first time, a number is assigned to that record by the system. This record ID displays in the title bar of that record.

   If you do merge or replace one of the records in the database with the incoming record, the old record is written to a replace file called `replace.<record type>.marc`, which is located in the `/rpt` directory.

   When you save a bibliographic record to the database from a work folder, the record in the work folder is automatically deleted, unless you have **Delete records from work files once saved to database** unselected in Session Defaults.

   Voyager checks for duplicate records according to the **Authority** and **Bibliographic Import/Replace profile** menus set in Session Defaults. For more information, see General Tab on page 10-2.

   Anytime the system is performing tasks that update the bibliographic tables, you are unable to update or delete records until the system is finished processing. While processing, the system displays "The Catalog is in read-only mode. You are not allowed to update/delete any bibliographic records at this time."

Saving to the Database and to a File Simultaneously

You can also save a record to the database and to a file simultaneously. This allows you to avoid having to do a regular **Save** and then a **Save to Database** as well. You can choose to save to the database and to a file and keep the record open onscreen by selecting **Record>Save to Database and to Local File**. You can also choose to save to the database and to a file and then to close the record once it has been saved by selecting **Record>Save to Database and to Local File and Close**.

When **Save to Database and to Local File** is selected, the bib is first saved to the database according to all of the rules regarding saving to the database (see above for more information). Then, if the save is successful, it is converted to the character set format specified for that file and then saved to a local file.

If there is no filename entered in Session Preferences, the Save to Database and to Local File option will be disabled. For more information, see Folders/Files Tab (Figure 10-6) on page 10-12.

NOTE:
If the record is saved to the database but is not successfully saved to the local file, a warning message will be displayed, but the record in the database will remain in its updated form.

Validating a Bib Heading

You can validate a heading manually. A validated heading is one that matches an authority heading in the database. Any row that contains a tag that is under Authority Control can be checked to see if it matches an Authority Heading. You can select **Record>Validate Heading** to check whether it is valid. This will validate the heading in the selected row.

You can also access Heading Validation by performing a right click of the mouse in the selection column of the grid in the MARC view form. From the menu that displays, click **Validate Heading in this Field**.

The procedure for validating a heading is shown in Procedure 4-6, Validating a Heading, on page 4-11.

NOTE:
While Validate Heading is only performed on a single row, performing Cut, Copy, and Delete from this menu operates on all selected rows. When a menu option does not apply, it is not displayed.

Procedure 4-6. Validating a Heading

Use the following to validate a heading.

1. From an open bibliographic record, select the row you want to check by clicking in the fixed column (the empty box to the left of the Tag row).

   Result: This highlights the row and displays the arrow in the fixed column.

2. Select **Record>Validate Heading** from the main menu or right-click in the fixed column and select **Validate Heading in this Field**.

   Result: If the field is a valid Authority heading, a dialog box opens with "This heading is valid."

3. Click **OK** to return to the Bibliographic record.

Result: If the field is not a valid Authority heading, the Headings Index displays.

4. Browse through the Headings Index until you find the appropriate heading. Select the heading and click **Replace**.

   Result: This copies the selected heading into the bib record in place of the invalid heading and returns you to the bib record.

   NOTE:
   If the subject heading selected from the index is of a different index type or a different thesaurus type, the following changes may also occur:

   ### Subject Headings

   Subject headings may have their indicator 2 changed if the heading selected from the browse index is of a different type from the one being validated. Furthermore, if indicator 2, that is, the second ind changes to a 7 which indicates that the heading type is in subfield 2, the new heading may contain a subfield 2 specifying the heading type.

   ### Non-Subject Headings

   If a non-subject heading is selected from the index, upon selecting a valid heading from the list of valid headings and clicking **Replace**, the original tag of the bib heading being replaced may change depending on the new heading. For instance, if a personal name heading is being validated (100 tag) and a corporate heading is selected to replace it, the bib tag will change to 110 to reflect the type of the new name heading.

   A record will not be given a new indicator 2 and a new tag simultaneously.

5. Right-click the mouse in the selection column of the grid in the MARC view form to display a pop-up menu with the following selections.

   - Copy this field
   - Cut this field
   - Paste before this field
   - Delete this field
   - Validate the heading of this field
   - Move this field up by one (moves the focus row up by one row)
   - Move this field down by one (moves the focus row down by one row)

NOTE:
While Validate Heading is only performed on a single row, performing **Cut**, **Copy**, and **Delete** from the menu bar operates on all selected rows. When a menu option does not apply, it is not displayed.

Make a Copy of a Record

You can make a copy of a record retrieved from the database by selecting **Record>Make a Copy**.

The procedure for copying a record is shown in Procedure 4-7, Copy a Record, on page 4-13.

Procedure 4-7. Copy a Record

Use the following to copy a record.

1. Display the record from the database that you want to copy. (See Search Dialog Box on page 3-28 for more information.)

2. When the record is displayed, select **Record>Make a Copy**.

   Result: A copy of the record displays. The 001 field is stripped out of the new copy. You can save this as a new record in the database and the Date of Creation is updated in the **008** fixed field, byte 00 through 05.

NOTE:
Voyager checks for duplicate records according to the preference set in Session Defaults. For more information, see General Tab on page 10-2.

You can also make a copy of records that do not come from the database by using the **Save As** command. For more information, see Save As... on page 4-7.

Printing a Record

You can print a bibliographic, authority, or holdings record. Currently, you cannot print item records. Even though some fixed fields do not display the information on the screen, the printout will contain a printed description of that field. To print a record, select **File>Print Record** from the main menu.

Printing Labels

You can print spine and piece labels by selecting **File>Print Label**. A spine label can be an attachment on an item for shelving purposes. A piece label can be an attachment to an item for general identification purposes.

Spine and piece labels can be customized. You can create separate spine and piece templates from bibliographic, holding, item and serial records. The templates are defined in the file `spinelabel.cfg` which is located in the `/Misc` subdirectory.

The default settings are as follows: the size of a spine label is 1 5/8" high by 9/10" wide. The size of a piece label is 1 5/8" high by 2 9/10" wide. However, this may be changed by your institution. See the section "Spine and Piece Label Print Template" for information on customizing labels.

The procedure for printing spine and piece labels is shown in Procedure 4-8, Print Spine and Piece Labels, on page 4-14.

Procedure 4-8. Print Spine and Piece Labels

Use the following to print spine and piece labels.

1. Select **File>Print Label**.

   Result: Depending on the location of the cursor prior to selecting the Print Label command, different information automatically displays in the **Print Labels** dialog box (Figure 4-5). See the sections Bibliographic Recordsand Holdings Recordsfor more information.

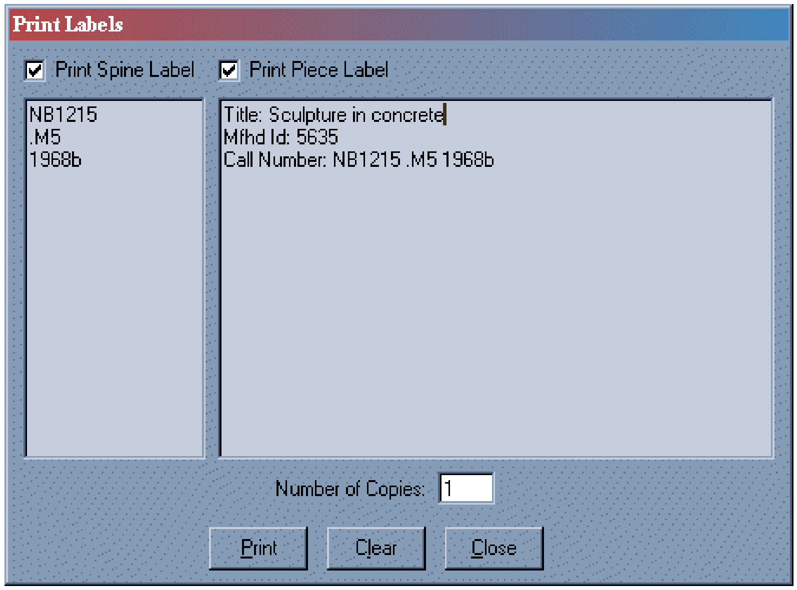

Figure 4-5. Print Labels dialog box

2. Mark the check box next to the type of label you want to print: **Spine Label** or **Piece Label**. Mark both check boxes to print both spine labels and piece labels.

3. Add or edit information in the spine and piece label sections.

   NOTE:
   The system automatically adjusts the text on the screen to fit the information on the appropriate label.

4. Enter the number of copies to be printed in the **Number of Copies** box. You can select any number from 1 to 9999.

5. Click the **Print** button to print the labels on the printer to which Windows is set to print. Click the **Clear** button to remove all information from the spine and piece label sections. Click the **Close** button to close the dialog box without printing the information.

   NOTE:
   Print Label will not send anything to the printer, unless some data is typed in the dialog box (in either section).

Bibliographic Records

If the active record is a bibliographic record, the following is the default information that will display in the **Print Labels** dialog box. See Table 4-2. You can change this information at any time before you print.

Table 4-2. Default Text in Print Labels Dialog Box - Bibliographic Record

Field	Default
Spine Label	Spine Label Name (as defined for the Location in System Administration), Address and Bib ID
Piece Label	Spine Label Name (as defined for the Location in System Administration), Address, Bib ID, Title, and Title Brief

Holdings Records

If the active record is a holdings record, the following is the default information that will automatically display. See Table 4-3. You can change this information at any time before you print.

Table 4-3. Default Text in Print Labels Dialog Box - Holdings

Field	Default
Spine Label	MFHD ID and Call Number
Piece Label	MFHD ID and Call Number

Item Records

If you select Print Label and the active record is an item record, the following information automatically displays. See Table 4-4. You can change this information at any time before you print.

Table 4-4. Default Text in Print Labels Dialog Box - Item Record

Field	Default
Spine Label	Spine Label Name (as defined for the Location in System Administration). Address and Bib ID
Piece Label	Spine Label Name (as defined for the Location in System Administration), Address, Bib ID, Item ID, Copy Number, and Item Barcode

Spine and Piece Label Print Template

The spine and piece label print template allows you to customize the appearances of spine and piece labels from bibliographic, holdings, item, and serial records. You can also create a template for a label with solely general information. You can define what kind of information displays on each label. You can customize its layout and appearance, and you can specify the number of copies that are to be printed. This information is contained in a file called `spinelabel.cfg` which is located in the `/Misc` directory on the client workstation.

For each type of information that can be printed, there are three stanzas in the template.

- `[Print Options XXX]` stanza
- `[Print Template Spine XXX]` stanza
- `[Print Template Piece XXX]` stanza

XXX represents the type of record or the specific names of the stanzas. For example, the bibliographic record stanzas are called `[Print Options Bibliographic]`, `[Print Template Spine Bibliographic]`, and `[Print Template Piece Bibliographic]`.

NOTE:
These names cannot be changed. Altering the names causes label printing to fail.

The `[Print Options XXX]` stanza contains the formatting and general information regarding the label. The `[Print Template Spine XXX]` stanza contains the information and the layout for printing the spine label. The `[Print Template Piece XXX]` stanza contains the information and the layout for printing the piece label.

There is also a single `[Templates]` stanza at the beginning of the file.

Templates Stanza

The `[Templates]` stanza contains the list of the different types of templates that can be customized. The `[Templates]` stanza *cannot* be changed. Editing the `[Templates]` stanza in any way causes label printing to become unpredictable.

[Print Options XXX] Stanza

The `[Print Options XXX]` stanza contains formatting and other information on each type of record for which a label can be created. See Figure 4-6 for a description of the options available in the `[Print Options XXX]` stanza.

```
[Print Options Bibliographic]
StandardFont=The name of the default font
StandardFontSize=The size of the default font
AlternateFont=The name of the alternate font
AlternateFontSize=The size of the alternate font
Copies=    The number of copies that are to be
        printed
TabWidth=  The width in inches that the tab code
        (\T) represents
Margin=    The label’s left margin, in inches
SpineLabelHeight=The height of the spine label, in
        inches
SpineLabelWidth=The width of the spine label, in
        inches
PieceLabelHeight=The height of the piece label, in
        inches
PieceLabelWidth=The width of the piece label, in
        inches
```

Figure 4-6. Description of options in the [Print Options Bibliographic] stanza

Print Template Spine/Print Template Piece Stanza

The `[Print Template Spine XXX]` and `[Print Template Piece XXX]` stanzas can be completely customized. Any type of information can be entered into the stanza as well as any additional text or field labels. See Figure 4-7 and Figure 4-8.

```
[Print Template Spine Serial Issue]
Name: \B\F102\b
Addr1: \U\F510\u
Component Name: \F600
Enum Chron: \F601
Receipt Date: \F602
```

Figure 4-7. Sample [Print Template Spine XXX] stanza

```
[Print Template Piece Serial Issue]
Name: \B\F102\b
Addr1: \U\F510\u
Component Name: \F600
Enum Chron: \F601
Receipt Date: \F602
```

Figure 4-8. Sample [Print Template Piece XXX] stanza

Whatever you enter in the `[Print Template Spine XXX]` or `[Print Template Piece XXX]` stanzas prints on the label. The text that you enter displays onscreen. To get specific information such as the Title from the database, you can enter *action codes*.

If you want nothing to display in the field for a particular label in the dialog box onscreen, simply enter nothing after the stanza name. If nothing is entered in a particular `[Print Template Spine XXX]` or `[Print Template Piece XXX]` stanza, nothing displays for that label or piece onscreen. However, you may still enter anything into the label or piece field in the **Print Labels** dialog box and print that information.

Action codes are used in these stanzas to change how the information displays on the label, and field codes are used after the \F action code to specify the information that is to be printed.

The information you enter in the `[Print Template Spine XXX]` and `[Print Template Piece XXX]` stanzas prints with the font and font size specified in the StandardFont and StandardFontSize variables in the `[Print Options XXX]` stanza for that type of record, unless you specify otherwise. See "Printing in the Alternate Font" and "Changing Font Size". For example, if you want the caption **Item Barcode:** to print, simply enter **`Item Barcode:`**.

Action Codes

Table 4-5 contains a list of action codes that you can use to change how the information displays on the labels.

Table 4-5. Action codes descriptions

Action Codes	Description
\	prints a blank line
\A	starts alternate font

Table 4-5. Action codes descriptions

Action Codes	Description
\a	ends alternate font
\B	starts bold
\b	ends bold
\I	starts italic
\i	ends italic
\U	starts underline
\u	ends underline
\S	starts new font size (a two digit size must follow \S)
\s	ends new font size
\T	inserts a tab
\F	inserts field data (a three digit field code must follow \F)

Initiating and Ending Action Codes

The `\A` and `\a`, `\B` and `\b`, `\I` and `\i`, `\U` and `\u`, and `\S` and `\s` action codes are initiated and ended in the same way. Enter the uppercase action code before the information it is to effect, and enter the lowercase action code after the information it is to effect. For example, if you want the caption Item Barcode: to print in bold, enter:

```
\BItem Barcode:\b
```

Printing Field Information

To print field information, you must enter a field code after the `\F` action code. For example, if you entered Item Barcode: as a caption and wanted the item barcode information to be retrieved from the server and printed after the Item Barcode: caption, you enter:

```
Item Barcode: F\401
```

Printing in the Alternate Font

To have the item barcode information print in the alternate font and font size, you would enter the `\A` action code when the alternate font is to start and the `\a` action code when the alternate font is to end:

```
Item Barcode= \A\F401\a
```

The alternate font is specified after the `AlternateFont` variable, and the alternate font size is specified after the `AlternateFontSize` variable. Both of these display in the `[Print Options XXX]` stanza for that type of record.

If you have chosen your alternate font as a barcode font, you may need to print a few lines of blank space beneath the information that is to be printed with the barcode font to ensure that the barcode does not overlap with the information beneath it. Enter the `\` (backslash) action code on a line by itself to print a blank line.

NOTE:
The barcode font that is included with Voyager is called `Barcode 3 of 9`. If you use this font as your alternate font and your scanning device requires start/stop characters, you must put an `*` (asterisk) on both sides of the field that is to be printed with the alternate font in order for your scanner to read the barcode after it is printed.

For example, if you want to print the item barcode field in the alternate font, and you have selected as your alternate font `Barcode 3 of 9`, you enter:

```
\A*\F401*\a
```

NOTE:
If you are using this barcode font, and you make it print bold (`\B\A*\F401*\a\b`), the barcode height will print taller and the digits normally beneath the barcode will not be visible; if you are using the barcode font and you make it print italic (`\I\A*\F401*\a\i`), the barcode height will print shorter. If you chose to use a different barcode font, you should read the documentation on the barcode font to determine what start/stop character must be used.

Changing Font Size

To change the size of the font that the information is printing in, you would enter the `\S##` action code (where `##` stands for the 2-digit size of the font) before the information, and the `\s` action code after the information (`\S24\F401\s`). If you do not enter the `\s` action code after the information, all subsequent information is printed with this new font size.

Inserting a Blank Line

To insert an extra line of space between different lines of information on a printout, you would enter the `\` (backslash) action code on a line by itself between the different lines of information.

Inserting a Tab

To tab a piece of information over from the left margin, you enter the `\T` action code before the information. The tab width that applies to this action code is specified after the TabWidth variable in the `[Print Options XXX]` stanza for that type of record.

Spine Label Field Codes

Table 4-6 contains the list of Generic Field Codes (100 Series) field codes. The data for the 100 Series field codes is defined through the Voyager System Administration client application.

Table 4-6. Generic Field Codes - 100 Series

Data Displayed	Code
Current Date & Time	100
Library Display Name	101
Library Name	102
Nuc Code	103

Table 4-7 contains the list of Bibliographic Field Codes (200 Series) field codes. A detailed definition of the data retrieved for the 200 Series field codes can be found in the *Voyager System Administration User's Guide*.

Table 4-7. Bibliographic Field Codes - 200 Series

Data Displayed	Code
Bib_Id	200
Title_Brief	201
Title (see also Title long)	202
Author	203
Imprint	204

Table 4-8 contains the list of Holdings Field Codes (300 Series) field codes. The 300 Series field codes pull the content to print from the MFHD WebVoyage display format as defined by the institution.

Table 4-8. Holdings Field Codes - 300 Series

Data Displayed	Code
Mfhd_Id	300

Table 4-8. Holdings Field Codes - 300 Series

Data Displayed	Code
Call Number - Display Format	301

Table 4-9 contains the list of Item Field Codes (400 Series) field codes. The 400 Series field codes use the data stored in the item record for printing the spine label.

Table 4-9. Item Field Codes - 400 Series

Data Displayed	Code
Item_Id	400
Item Barcode	401
Enumeration	402
Chronology	403
Year	404
Caption	405
Free Text	406
Copy Number	407
Item Type Code	411
Item Type Name	412
Item Type Display	413
Item Location Code (prints the temporary location if there is one; otherwise prints the permanent location)	414
Item Location Name	415
Item Location Display Name	416
Item Location Spine Label	417
Pieces	418
Price	419
Spine Label	420

Table 4-10 contains the list of Library Address Field Codes (500 Series) field codes. The data for the 500 Series field codes is defined through the Voyager System Administration client application.

Table 4-10. Library Address Field Codes - 500 Series

Data Displayed	Code
Address Line 1	510
Address Line 2	511
Address Line 3	512
Address Line 4	513
Address Line 5	514
City	515
State/Province	516
Zip/Postal Code	517
Country	518

Table 4-11 on page 24 contains the list of Received Serial Issue (600 Series) field codes. The data for the 600 Series field codes is defined through the serials retrieval process. See the *Voyager Acquisitions User's Guide* for more information.

Table 4-11. Received Serial Issue Field Codes - 600 Series

Data Displayed	Code
Component Name	600
Enum Chron	601
Receipt Date	602

Sample Template File

Figure 4-9 is a sample label print template file.

```
[Templates]
Blank
Bibliographic
Holdings
Item
Serial Issue

[Print Options Blank]
StandardFont=Times New Roman
StandardFontSize=12
AlternateFont=Arial
AlternateFontSize=12
Copies=3
TabWidth=1
Margin=0.05
SpineLabelHeight=1.625
SpineLabelWidth=.9
PieceLabelHeight=1.625
PieceLabelWidth=2.9

[Print Template Spine Blank]
Name: \B\F102\b
Addr1: \U\F510\u
Addr2: \F511
Addr3: \F512
Addr4: \F513
Addr5: \F514
City: \F515
St: \F516
Zip: \F517
Country: \F518

```

Figure 4-9. Sample label print template file

Line#

```
[Print Template Piece Blank]
Name: \B\F102\b
Addr1: \U\F510\u
Addr2: \F511
Addr3: \F512
Addr4: \F513
Addr5: \F514
City: \F515
St: \F516
Zip: \F517
Country: \F518

[Print Options Bibliographic]
StandardFont=Times New Roman
StandardFontSize=12
AlternateFont=Arial
AlternateFontSize=12
Copies=1
TabWidth=1
Margin=0.05
SpineLabelHeight=1.625
SpineLabelWidth=.9
PieceLabelHeight=1.625
PieceLabelWidth=2.9

[Print Template Spine Bibliographic]
Name: \B\F102\b
Addr1: \U\F510\u
Bib Id: \F200
Author: \F203
Imprint:
Title: \F202
Title - Brief: \F201
```

Figure 4-9. Sample label print template file

```

[Print Template Piece Bibliographic]
Name: \B\F102\b
Addr1: \U\F510\u
Bib Id: \F200
Author: \F203
Imprint:
Title: \F202
Title - Brief: \F201

[Print Options Holdings]
StandardFont=Times New Roman
StandardFontSize=12
AlternateFont=Arial
AlternateFontSize=12
Copies=1
TabWidth=1
Margin=0.05
SpineLabelHeight=1.625
SpineLabelWidth=.9
PieceLabelHeight=1.625
PieceLabelWidth=2.9

[Print Template Spine Holdings]
Mfhd Id: \F300
Call Number: \F301

[Print Template Piece Holdings]
Mfhd Id: \F300
Call Number: \F301

[Print Options Item]
StandardFont=Times New Roman
```

Figure 4-9. Sample label print template file

```
StandardFontSize=12
AlternateFont=Arial
AlternateFontSize=12
Copies=1
TabWidth=1
Margin=0.05
SpineLabelHeight=1.625
SpineLabelWidth=.9
PieceLabelHeight=1.625
PieceLabelWidth=2.9

[Print Template Spine Item]
Name: \B\F102\b
Addr1: \U\F510\u
Bib Id: \F200
Author: \F203
Chron: \F403
Caption: \F405
Free Text: \F406
Enumeration: \F402
Item Id: \F400
Year: \F404
Copy Number: \F407
Pieces:
Price:
Spine Label:
Item Barcode: \F401
Item Type Code:
Item Type:
Item Type Display:
Item Location Code:
Item Location Display Name:
Item Location:
```

Figure 4-9. Sample label print template file

```
Media Type:
Media Type Code:

[Print Template Piece Item]
Name: \B\F102\b
Addr1: \U\F510\u
Bib Id: \F200
Author: \F203
Chron: \F403
Caption: \F405
Free Text: \F406
Enumeration: \F402
Item Id: \F400
Year: \F404
Copy Number: \F407
Pieces:
Price:
Spine Label:
Item Barcode: \F401
Item Type Code:
Item Type:
Item Type Display:
Item Location Code:
Item Location Display Name:
Item Location:
Media Type:
Media Type Code:

[Print Options Serial Issue]
StandardFont=Times New Roman
StandardFontSize=12
AlternateFont=Arial
AlternateFontSize=12
```

Figure 4-9. Sample label print template file

```
Copies=1
TabWidth=1
Margin=0.05
SpineLabelHeight=1.625
SpineLabelWidth=.9
PieceLabelHeight=1.625
PieceLabelWidth=2.9

[Print Template Spine Serial Issue]
Name: \B\F102\b
Addr1: \U\F510\u
Component Name: \F600
Enum Chron: \F601
Receipt Date: \F602

[Print Template Piece Serial Issue]
Name: \B\F102\b
Addr1: \U\F510\u
Component Name: \F600
Enum Chron: \F601
Receipt Date: \F602
```

Figure 4-9. Sample label print template file

Closing a Record

You can close the active record by selecting **File>Close**. This command closes the current record. If changes have been made to the record since it was last saved, you will be asked to save the changes or close without saving them. You can also close all of the records that you have open by selecting **File>Close All**.

Cataloging & Bibliographic Record Linking

5

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Cataloging & Bibliographic Record Linking

5

Introduction

Once you have added at least one bibliographic record linking profile in System Administration, you can search for, review, and edit related records in the Cataloging module.

Configuration information for bibliographic record linking is located in the *Voyager System Administration User's Guide* in the chapter discussing search configuration and in the *WebVoyáge User's Guide* in the Appendix describing WebVoyáge configuration for bibliographic record linking.

For more information about searching for records in the Cataloging module, see Search Dialog Box on page 3-28.

For more information about editing or deleting records in the Cataloging module, see Changing Information on page 4-1.

Displaying Related Records

Related Records displays on the menu bar whenever a linked source record is the active record in Cataloging. Clicking **Related Records** displays one or more bibliographic linking profiles. If you select one of the profiles, the system retrieves any records related to the source record based on the profile.

It is the presence of the tag/subfield override in a profile and the existence of those tags/subfields in the active record that determines whether or not any profile names display from **Related Records**.

Before **Related Records** displays on the menu bar, you must have at least one bibliographic linking profile created in the Voyager System Administration module.

NOTE:
For the purpose of this discussion, assume that three linking profiles have been added to System Administration.

Table 5-1. Example of profile names and overrides

Profile Name	Tag/Subfield Override
776Host	776 ‡x
780Preceding	780 ‡x
785Succeding	785 ‡x

If the source record currently active in Cataloging contains any of the tag/subfields listed in Table 5-1, **Related Records** displays on the menu bar.

- If the source record contained only a 776 ‡x, 776Host would be the only profile listed when **Related Records** is clicked.
- If the source record contained a 776 ‡x and a 780 ‡x, 776Host and 780Preceding displays in the list.
- If the source record contained all three tag/subfields, all three profile names display in the list.

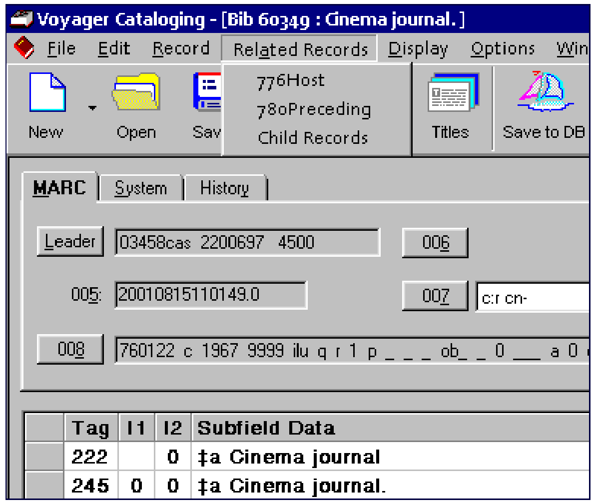

Figure 5-1. Related Records listing applicable profiles for "Cinema Journal"

Figure 5-1 shows a partial display of a MARC record in the Cataloging module. Three bibliographic linking profiles are listed for the title *Cinema Journal*.

- 776Host
- 780Preceding
- Child Records

Selecting one of the profiles from the list retrieves any related records, based on the profile. For example, if you selected the 780Preceding profile, the system looks at the data in the 022 ‡a of the source record if that is the index defined in the profile and retrieves any records that contain the same data in the 780 ‡x.

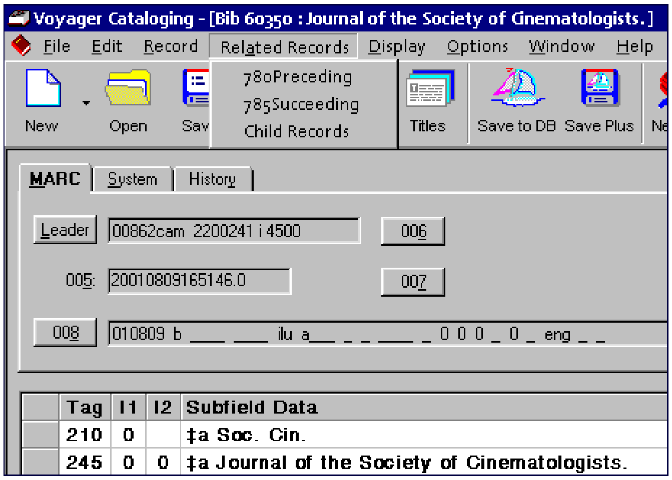

Figure 5-2. Preceding title for "Cinema Journal" and applicable profiles

Figure 5-2 shows the result of selecting the 780Preceding profile from the Related Records menu. It also shows the profiles which apply to the preceding title, *Journal of the Society of Cinematologists*. The Related Records menu lists both the 780Preceding and 785Succeeding profiles. Selecting the 785Succeeding profile would re-display the MARC record for *Cinema Journal*.

The Related Records menu for both *Cinema Journal* and *Journal of the Society of Cinematologists* lists a profile name Child Records. Selecting that profile would result in an error message.

Figure 5-3. No related records message

Neither title is related to any child records at this point. However, both records contain an 035 ‡a which are the tag/subfield overrides for that profile.

If the system finds only one related record, it displays the record. (This depends on whether or not the “Display bibliographic record directly if search results in only one title” option is set in Options>Preferences.) If the system finds more that one related record, a dialog box opens listing all related records. You can choose one or more titles from the list to display.

In the Cataloging module, you can quickly create new related records from a source record using templates. New functionality has been added to traditional templates in order to map tag/subfield information from a source record into a target record.

See Templates for general template information. If you are already familiar with creating and editing templates, see MARC Record Derivation Using Cataloging Templates on page 5-8.

Templates

A cataloging template allows you to use a pre-defined MARC record to easily create new records. Before you can create a record, there must be at least one template in the template folder of the Voyager directory. Voyager provides you with three templates: `bib.tem`, `auth.tem`, and `hold.tem` (typically located in `c:\voyager\catalog\templates`). These templates should not be deleted.

NOTE:
Templates cannot be retroactively applied to an existing record.

You must have at least one template for each type of record that you want to create (for example, `bib.tem`, `auth.tem`, `hold.tem`).

The procedure for creating a new template is shown in Procedure 5-1, Creating a New Template, on page 5-5.

Procedure 5-1. Creating a New Template

Use the following to create a new template.

1. Select **File>Template>New** from the menu.

   Result: The **Create a New Record** dialog box opens. See Figure 5-4.

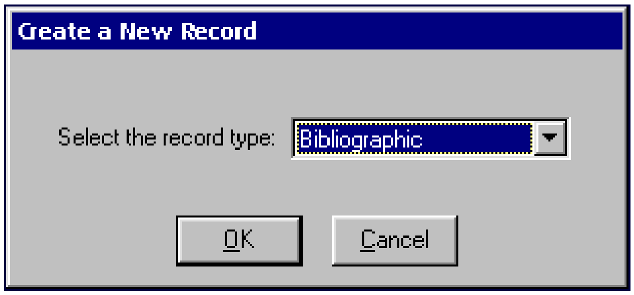

Figure 5-4. Create a New Record dialog box

2. Select the record type (Bibliographic, Authority, or Holdings) from the drop-down menu and click **OK**.

   Result: The system template for the record type you selected displays.

3. Create the new template by completing the leader, fixed fields, and variable fields.

   For more information about the leader, fixed, and variable fields, see the *Voyager Cataloging User's Guide.*

4. Select **File>Save As....** from the menu.

5. Enter the name you want for your template.

   The extension for the file must be `.tem`. For example, `thesis.tem`.

   NOTE:
   When a template is saved, it is not validated against authority records or the MARC tag table.

The procedure for editing a template is shown in Procedure 5-2, Editing a Template, on page 5-6.

Procedure 5-2. Editing a Template

Use the following to edit a template.

1. Select **File>Template>Edit** from the menu.

   Result: The **Open Template File** dialog box opens. See Figure 5-5.

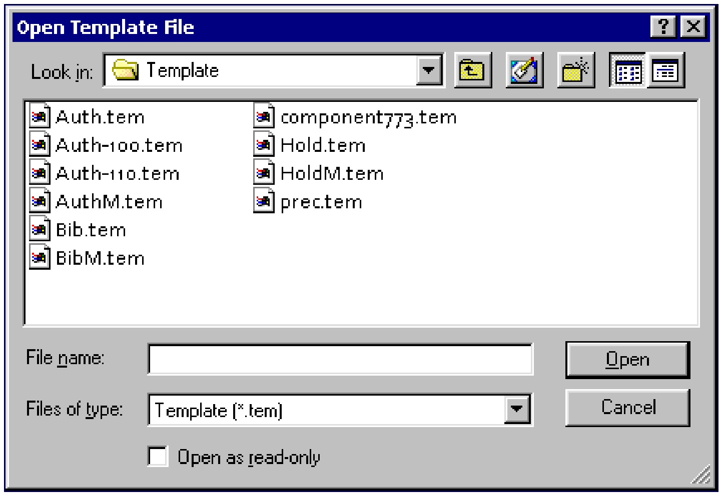

Figure 5-5. Open Template File dialog box

2. Select the template file you want to edit and click **Open** (or double-click the file).

   Result: The selected template opens.

3. Edit the template by changing the leader, fixed fields, and variable fields. You can use the same commands as you use for editing a record.

   For more information about editing and the leader, fixed, and variable fields, see the *Voyager Cataloging User's Guide*.

4. Select **File>Save** from the menu to save the template with the same name. Select **File>Save As...** to save the template with a different name. If you use **Save As...**, the extension for the file must be `.tem`.

NOTE:
When a template is saved, it is not validated against authority records or the MARC tag table.

The procedure for deleting a new template is shown in Procedure 5-3, Deleting a Template, on page 5-8.

Procedure 5-3. Deleting a Template

Use the following to delete a template.

1. Select **File>Template>Edit** from the menu.

2. Select the template you want to delete and click **Open** (or double-click the template).

   Result: The selected template displays.

3. Select **File>Template>Delete** from the menu.

   Result: The message "Are you sure you want to delete [the selected template]?" prompts you. See Figure 5-6.

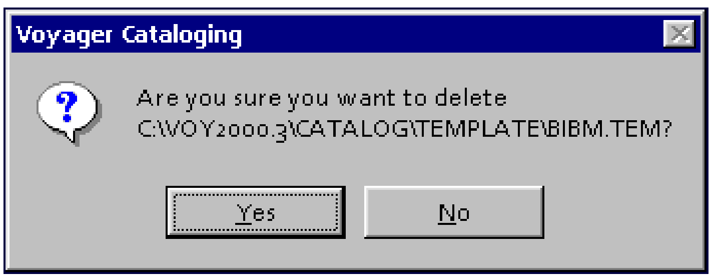

Figure 5-6. Verify delete template message

4. Click **Yes** to delete the selected template, or click **No** to close the dialog box without deleting the selected template.

MARC Record Derivation Using Cataloging Templates

In the section, Templates on page 5-5, you learned how to create, edit, and delete templates for use in the Cataloging module. You can use the functionality of templates to quickly create related records.

Related records are linked to each other by coordinated subfield values. For example, the 773 ‡x in the target or child record is linked to the 022 ‡a in the source or parent record. Another example of related records is the 780 ‡x in a successor serial title is related to the 022 ‡a of the predecessor serial title.

MARC record derivation allows you to use existing template functionality to create new, related MARC records whether they are bibliographic, holdings, or authority records. The new records can include static data from the template as well as dynamically mapped subfield data from the existing source record. You can also map subfields from one type of MARC record to a different type of MARC record.

This functionality can be used with Bibliographic Record Linking, or it can be used independently.

Derivation fields provide the link when you create related records in Cataloging. These fields specify the tag and subfield data in the active (source) MARC record that is mapped into a new MARC record. The derivation fields also determine the subfield in the new record to which the data is mapped.

You can add derivation fields to an existing template or create new templates. Templates containing derivation fields are created and maintained in the same manner as standard templates.

There are two basic formats for a derivation field. See Figure 5-7.

```
Line#
  1    ‡< 022a>
  2    ‡< ‡x 022a>
```

Figure 5-7. Examples of derivation fields

See Table 5-2 and Table 5-3 for a description of the elements contained in the examples in Figure 5-7.

Table 5-2. Description of the first example in line 1 of Figure 5-7

Component	Description
‡	delimiter symbol (hex 1f)
<	left (opening) angle bracket
022	tag in source record
a	subfield in source record

Table 5-2. Description of the first example in line 1 of Figure 5-7

Component	Description
>	right (closing) angle bracket

Table 5-3. Description of the first example in line 2 of Figure 5-7

Component	Description
‡	delimiter symbol (hex 1f)
<	left (opening) angle bracket
‡	delimiter symbol (hex 1f)
x	subfield in target record
022	tag in source record
a	subfield in source record
>	right (closing) angle bracket

IMPORTANT:
The delimiter symbol must always be immediately followed by the left (opening) angle bracket at the beginning of a derivation field.

Other than that one exception, spacing for derivation fields is irrelevant.

Table 5-4. Examples of spacing in derivation fields

Correct Format	Incorrect Format
‡<_022a>	‡_<_022a>
‡<_‡x_022a>	‡_<_‡x_022a>

NOTE:
In Table 5-4, the underscore (_) character in the incorrect formats indicates a space. The system automatically adds spacing in the Voyager Cataloging module. However, this spacing applies only to the display in the module. It does not translate into spacing for the WebVoyáge display of records.

So how does the system decipher this derivation field? It depends on which format has been used for the derivation fields.

If an operator wants to create a new record using a template which includes the tag, subfield, and derivation field 773 nn ‡x ‡< 022a>, the system creates the new record in the following manner:

- Reads the derivation field (‡< 022a>) in the template .
- Checks the active “source” record for an 022 tag, subfield a.

  If an 022 tag is present in the source record and subfield a contains data, the systems adds a 773 tag to the new target record and maps the data in the 022 ‡a to the 773 ‡x.

  If an 022 tag is present in the source record but subfield a is not present, *or* the 022 tag is not present in the source record, the system does not consider this a match. When a derivation field using this format does not match anything in the source record, the system adds a 773 ‡x to the new record but leaves the subfield empty.

  For example, if the number 1234-5678 appears in the 022 ‡a of the source record, the system maps that number into the 773 ‡x of the new target record. That is, 773 nn ‡x 1234-5678.

The system acts differently if the second derivation field format is used. For example, if the tag, subfield, and derivation field 773 nn ‡< ‡x 022a> is added to a template, the system creates a new record in the following manner:

- Reads the derivation field (‡< ‡x 022a>) in the template.
- Checks the active source record for an 022 tag, subfield a.

  If an 022 tag is present in the source record and subfield a contains data, the systems adds a 773 tag to the new target record and maps the data in the 022 ‡a to the 773 ‡x.

  If an 022 tag is present in the source record but subfield a is not present, *or* the 022 tag is not present in the source record, the system does not consider this a match. When a derivation field using this format does not match anything in the source record, the system adds a 773 to the new record but does not add a subfield or any subfield data.

  Again, if the number 1234-5678 appears in the 022 ‡a of the source record, the system maps that number into the 773 ‡x of the new target record. The difference in format determines how missing information is handled.

NOTE:
If the chosen template does not contain any derivation fields, the system treats the template as a standard template (see Templates on page 5-5).

Multiple Subfields

You can add extra characters to derivation fields in order to accommodate tags which are allowed to have repeating subfields. For example, if your source record includes:

> 022 ‡a 1234-5678 ‡a 2234-5467 ‡a 3234-5467

and you want to map each of those subfields to separate subfields in your new record, then the derivation field displays as follows.

> 773 nn ‡< ‡x 022a>

The addition of the ‡x on the inside of the angle brackets maps all the 022 subfield data to separate 773 subfields as follows.

> 773 nn ‡x 1234-5678 ‡x 2234-5467 ‡x 3234-5467

Non-Matching Subfields

You can use this same format to determine how the system should handle non-matching subfields. You can decide whether or not the tags and indicators specified in the derivation field are added to the new record if there are no matching subfields in the source record.

For example, if the source record contains the following data:

> 022 nn ‡y 1234-5678

and you define a template with a derivation field like this:

> 773 nn ‡< ‡x 022a>

the new record includes only the 773 nn without any subfield data.

Rules and Examples for Derivation Fields

Depending on the data in the source record, and the format of the derivation fields in the template, you could have many different results. The tables beginning with Table 5-5 through Table 5-12 describe specific rules for derivation fields.

IMPORTANT:
You can map a tag/subfield combination from the source record into the same tag/subfield combination or a different tag/subfield combination in the new record. In the tables below, the examples are mapping information

from the tag/subfield combination in the source record to another, different tag/subfield combination in the target record.

Table 5-5. Example 1 - Derivation field

Rule	If the derivation field has the format ‡< ###c> (no space between ‡ and <) where the first three characters (represented by "#") are numeric and the last character (represented by "c") is alphanumeric, map the data from the corresponding tag/subfield combination (contained within the angle brackets < >) in the active bibliographic record into the new record, replacing the derivation tag.
If the active source record contains:	022 nn ‡a 1234-5678
And the cataloging template contains:	773 nn ‡x ‡< 022a>
Then the new record contains:	773 nn ‡x 1234-5678

Table 5-6. Example 2 - Derivation field

Rule	If the derivation field has the format ‡< ‡c ##c> (no space between ‡ and <), map the data from the corresponding tag/subfield combination in the active bibliographic record to the new record only if the tag/subfield combination exists in the active bibliographic record.
If the active source record contains:	022 nn ‡a 1234-5678
And the cataloging template contains:	773 nn ‡< ‡x 022a>
Then the new record contains:	773 nn ‡x 1234-5678

Table 5-7. Example 3 - Derivation field

Rule	If the derivation field has the format ‡< ###c>, and the corresponding tag exists in the active record but the subfields do not match, or the corresponding tag does not exist in the active record, add only the tag and subfield.

Table 5-7. Example 3 - Derivation field

If the active source record contains:	022 nn ‡y 1234-5678 *or* the 022 tag does not exist in the active record
And the cataloging template contains:	773 nn ‡x ‡< 022a>
Then the new record contains:	773 nn ‡x (subfield data empty)

Table 5-8. Example 4 - Derivation field

Rule	If the derivation field has the format ‡< ‡c ##c>, and the corresponding tag exists in the active record but the subfields do not match, or the corresponding tag does not exist in the active record, add only the tag.
If the active source record contains:	022 nn ‡y 1234-5678 *or* the 022 tag does not exist in the active record
And the cataloging template contains:	773 nn ‡< ‡x 022a>
Then the new record contains:	773 nn (no subfield or subfield data)

Table 5-9. Example 5 - Derivation field

Rule	If the format of the derivation field is ‡< ###c> and a subfield is repeated in the active bibliographic record, map all occurrences of the subfield into the new record in the order in which they appear. **NOTE:** This format adds one new tag followed by the subfield data separated by spaces.
If the active source record contains:	022 nn ‡a 1234-5678 022 nn ‡a 2234-5678 022 nn ‡a 3334-5678
And the cataloging template contains:	773 nn ‡x ‡< 022a>
Then the new record contains:	773 nn ‡x 1234-5678 2234-5678 3334-5678

Table 5-10. Example 6 - Derivation field

Rule	If the format of the derivation field is ‡< ‡c ###c> and a subfield is repeated in the active bibliographic record, map each occurrence of the subfield into the new record in the order in which they appear. **NOTE:** This format adds one new tag followed by the subfield data separated by the subfield specified in the derivation field.
If the active source record contains:	022 nn ‡a 1234-5678 022 nn ‡a 2234-5678 022 nn ‡a 3334-5678
And the cataloging template contains:	773 nn ‡< ‡x 022a>
Then the new record contains:	773 nn ‡x 1234-5678 ‡x 2234-5678 ‡x 3334-5678

Table 5-11. Example 7 - Derivation field

Rule	If the derivation field has the format ‡< VRID> or ‡< ‡c VRID>, map the Voyager record ID from the active record into the new record.
If the active source record contains:	001 60349
And the cataloging template contains:	773 nn ‡x ‡< VRID> or 773 nn ‡< ‡x VRID>
Then the new record contains:	773 nn ‡x 60349

Table 5-12. Example 9 - Derivation field

Rule	In all cases, if the format of the derivation field is not valid, output it to the destination record as is.
If the active source record contains:	022 nn ‡a 1234-5678
And the cataloging template contains:	773 nn ‡x < ‡x 022a> (should be either 773 nn ‡x ‡< 022a> or 773 nn ‡< ‡x 022a>)

Table 5-12. Example 9 - Derivation field

Then the new record contains:	773 nn ‡x < ‡x 022a> (copies the characters exactly)

NOTE:
If a template containing derivation fields is used to create a new record without an active source record, the system considers the derivation fields as non-matching and output information to the new record as described in Table 5-7 and Table 5-8.

Template Example

There is no limit to the number of templates you can create. They can be short templates, containing only a few tags and subfields, or very long. They can contain derivation fields or not. And, you can include derivation fields into standard templates. With the addition of derivation fields, template functionality has been expanded to now include:

- Tags and subfields with static text. You could use static text when you create multiple records using the same subject headings.

  Example: 650 nn ‡a Geography ‡b United States

- Tags with subfields used as place markers. Use the place markers as reminders to always complete those particular subfields.

  Example: 300 ‡a ‡b ‡c

- Tags with subfields using characters as place markers. Use these place markers as reminders to complete those subfields using a particular format.

  Example: 260 ‡a ‡b ‡c yyyy

- Tags with derivation fields. See the examples beginning with Table 5-5.

- Combinations of all of the above.

  Example: 300 nn ‡a ### p. : ‡b ill. ‡c ## cm.

  Example: 650 nn ‡a Geography ‡< ‡z 650z> ‡< ‡y 650y>

  Example: 100 nn ‡a Syria, Derrell, ‡e lyricist. ‡< ‡a 505r>

To illustrate the functionality of templates, consider this template created to link bibliographic records for individual songs to the bibliographic record for the CD recording.

Table 5-13. Example of a template using standard and derivation fields

Tag	Subfield Data
028	‡< ‡a 028a>
035	‡< ‡a 035a>
090	‡< ‡a 090a> ‡< ‡b 090b>
100	‡< ‡a 700a> ‡< ‡d 700d>
245	‡< ‡a 505a> ‡< ‡a 505t> ‡< ‡h 245h>
260	‡< ‡a 260c> ‡< ‡b 260b> ‡< ‡c 260c>
300	‡< ‡a 300a> ‡< ‡b 300b> ‡< ‡c 300c>
500	‡< ‡a 500a>
505	‡a Concertos for Harp and Orchestra
505	‡< ‡a 505a>
508	‡a ‡< 508a>
650	‡< ‡a 650a> ‡< ‡z 650z> ‡< ‡y 650y>
700	‡< ‡a 700a>
773	‡< ‡a 110a> ‡t ‡< 245a> ‡< 245b> ‡d ‡< 260a> ‡< 260b> ‡< 260c> ‡< ‡w 035a>
773	‡< ‡6 VRID>

Many of the tags in Table 5-13 use only derivation fields. Others use combinations, such as Tag 100 and 245. Tag 505 contains static text that is copied directly into the new record. Notice Tag 773 contains derivation fields in both the ‡< ###c> and ‡< ‡c ###c> formats for the same subfield.

IMPORTANT:
When you are creating new records using a template containing derivation fields, the system includes any information that has been added to the source record, even if the record has not been saved. For example, if you edited a source record by adding subject information (650abc), then created a new record using the template in Table 5-13, the new record would include the subject information from the source record even though you have not yet saved the source record to the database.

Session Defaults and Preferences

You can access the Session Defaults and Preferences dialog box by selecting **Options>Preferences**. From this dialog box, you can change a number of defaults which are presented on seven tabs.

- General
- Validation
- Work Flow
- Item Defaults
- Folders
- Mapping
- Colors and Fonts

The defaults you choose are saved when you exit the Cataloging module. Anyone who uses the Cataloging module on that machine begins with the same defaults that you selected unless they change them.

For more information about Session Defaults and Preferences for the Cataloging module, please see that section of the *Voyager Cataloging User's Guide*.

Folders/Files Tab

Setting defaults on the Folders/Files tab is especially useful for MARC derivation of records.

If you want to use one particular template to create new MARC records, you can specify the template as a default in **Session Options and Preferences** in the Cataloging module.

You can enter the entire path for a default template in the appropriate box (Bibliographic, Authority, or Holdings). The filename must refer to an existing file. You can also click the ellipses button to select the template you want from the appropriate directory.

The procedure for defining a default template is shown in Procedure 5-4, Defining a Default Template, on page 5-19.

Procedure 5-4. Defining a Default Template

Use the following to define a default template.

1. Open the Cataloging module.

2. Select **Options>Preferences** from the menu bar. Figure 5-8.

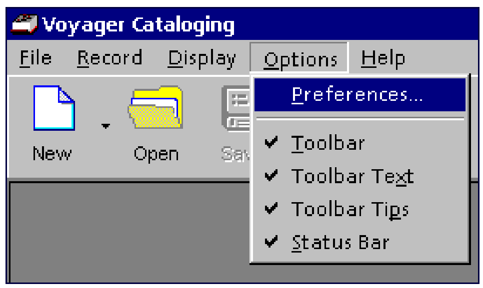

Figure 5-8. Menu bar in the Cataloging module

Result: The **Session Defaults and Preferences** dialog box opens. See Figure 5-9.

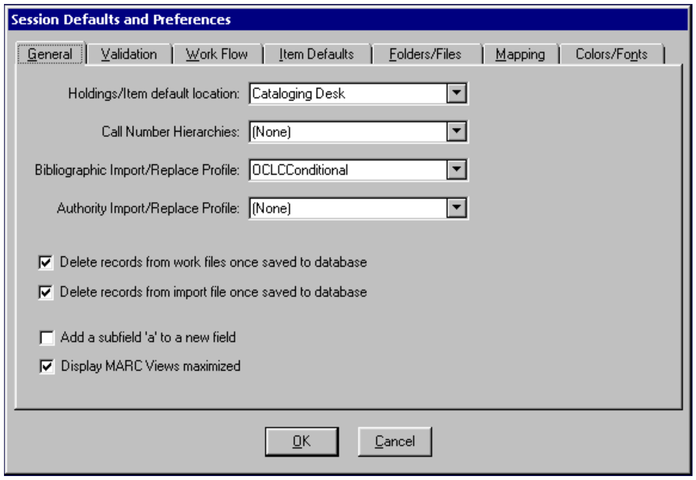

Figure 5-9. Session Defaults and Preferences dialog box

3. Click the **Folders/Files** tab.

   Result: The dialog box displays the **Folders and Files** options. See Figure 5-10.

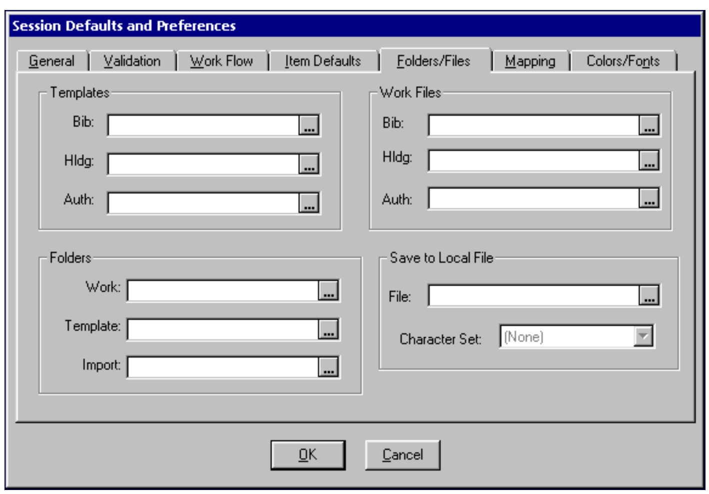

Figure 5-10. Folders/Files tab for Session Defaults and Preferences

4. Enter the entire path to the desired template for the appropriate record type (bibliographic, authority, or holdings) in the **Templates** section. For example, `c:\voyager\catalog\template\bib.tem`.

   You can also click the ellipsis button.

   Result: The **Select Bibliographic Template** dialog box opens.

   If you have not defined a Template folder on the **Folders/Files** tab (see Procedure 5-5, Defining a Default Folder, on page 5-23), the dialog box defaults to the Voyager directory.

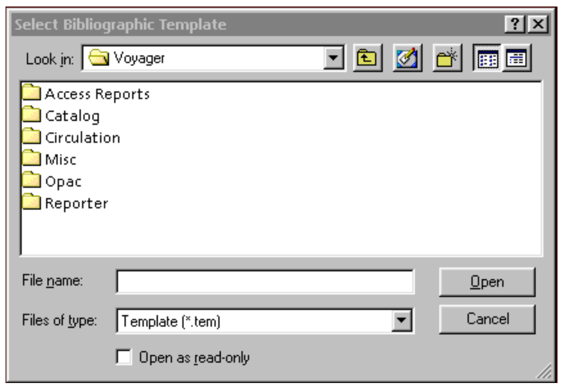

Figure 5-11. Select Bibliographic Template dialog box - no default Template folder

5. Select the **Catalog** folder and click the **Open** button (or double-click the **Catalog** folder).

   There are three standard folders within the Catalog folder. They are MARCTemplate, Tag Tables, and Template.

   NOTE:
   The default bibliographic, holdings, and authority templates are located in the Template folder. You can save any new templates that you create to that folder, but it is not required. If you are sharing templates among coworkers, you could create a Template folder on a network that everyone can access.

6. Select the **Template** folder and click the **Open** button (or double-click the **Template** folder).

Result: The **Select Bibliographic Template** dialog box displays a list of template files. If you have defined a Template folder on the **Folders/Files** tab, and you click the ellipsis button for a template, the **Select Bibliographic Template** dialog box defaults directly to that folder.

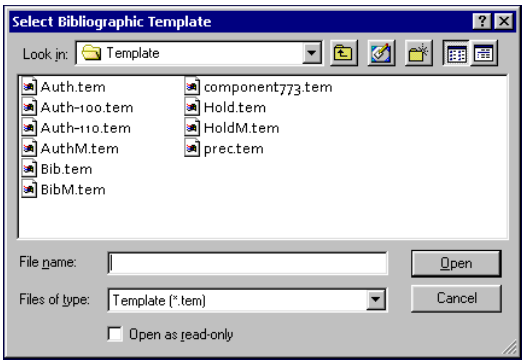

Figure 5-12. Template files in the Template folder

7. Select the template file you want to use and click the **Open** button (or double-click the template file).

   Result: The path to the file automatically displays in the **Bib** field in the Templates section.

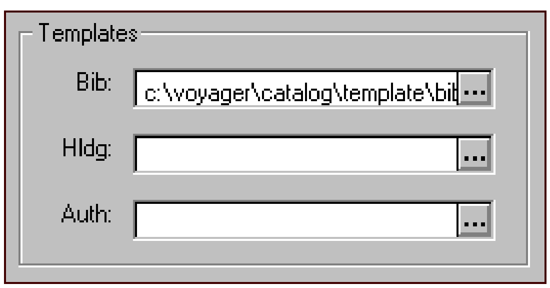

Figure 5-13. Bib template selected on Folders/Files tab

8. Click the **OK** button to close the **Session Defaults and Preferences** dialog box and save your changes.

NOTE:
A file path can only be specified in the **Templates** section if there is one template (as opposed to multiple templates) defined for each record type.

See Procedure 5-6, Creating New Records Using Templates, on page 5-25 to learn how to use default templates when creating new MARC records.

In the Folders section, you can enter or select a default Template folder so when you want to edit an existing template, the **Open Template File** dialog box defaults to the specified folder. Also, if you specify a default Template folder, any new templates that you create are saved to that folder.

The procedure for defining a default folder is shown in Procedure 5-5, Defining a Default Folder, on page 5-23.

Procedure 5-5. Defining a Default Folder

Use the following to define a default folder.

1. Open the Cataloging module.

2. Select **Options>Preferences** from the menu bar.

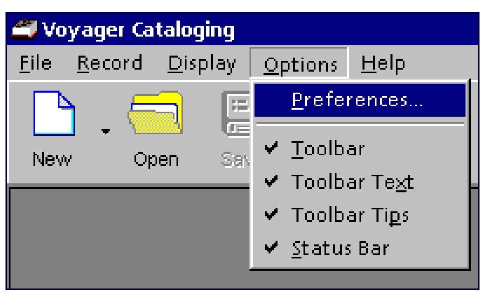

Figure 5-14. Menu bar in the Cataloging module

Result: The **Session Default and Preferences** dialog box opens. See Figure 5-9.

3. Click the **Folders/Files** tab.

Result: The dialog box displays the **Folders and Files** options. See Figure 5-10.

4. In the **Folders** section, enter the entire path to the desired folder in the **Template** field. For example, `c:\voyager\catalog\template\`.

   You can also click the ellipsis button.

   Result: The **Select Directory** dialog box opens. See Figure 5-15.

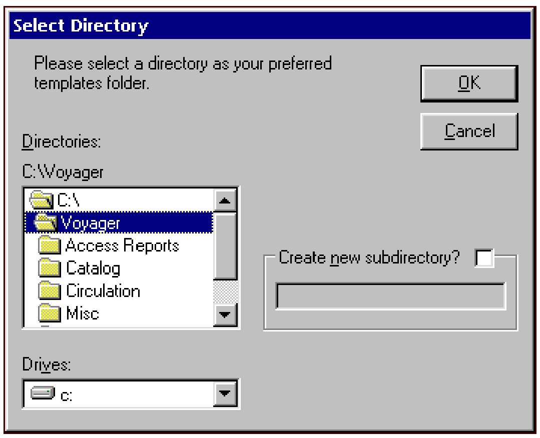

Figure 5-15. Select Directory dialog box

The Select Directory dialog box should default to the Voyager directory. If not, you can browse your PCs hard drive by double-clicking the `C:\` in the Directory drop-down list.

Use the Drives drop-down list to change drives if your default folder resides on a drive other than `C:\`

5. Double-click the **Catalog** folder in the Voyager directory to expand it and display the contents.

   There are three standard folders within the Catalog folder. They are MARCTemplate, Tag Tables, and Template.

NOTE:
The default bibliographic, holdings, and authority templates are located in the Template folder. You can save any new templates that you create to that folder, but it is not required. If you are sharing templates among coworkers, you could create a Template folder on a network that everyone can access.

6. Double-click the **Template** folder.

7. Click the **OK** button in the **Select Directory** dialog box to save your selection to the **Folders/Files** tab and close the dialog box.

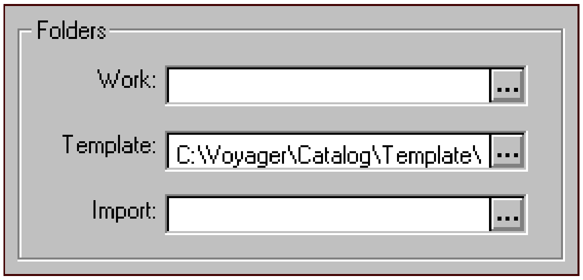

Figure 5-16. Default Template folder selected on Folders/Files tab

8. Click the **OK** button to close the **Session Defaults and Preferences** dialog box and save your changes.

   See Procedure 5-7, Creating New Records Using a Default Folder, on page 5-26 to learn how to use a default folder when creating new MARC records.

Once you have created a template using derivation fields, you can begin creating new records. For more information about creating and editing MARC records in the Cataloging module, see the *Voyager Cataloging User's Guide*.

If you need to create many new related records from one source record, selecting a default template is the quickest method of record creation. You can change your default template at any time.

The procedure for creating new records using templates is shown in Procedure 5-6, Creating New Records Using Templates, on page 5-25.

Procedure 5-6. Creating New Records Using Templates

Use the following to create new records using templates.

1. Search for and display the source bibliographic record.

For more information about searching in the Cataloging module, see the *Voyager Cataloging User's Guide*.

2. Click the **New** button on the Cataloging toolbar.

   Result: The system automatically uses the default template defined in the **Bib** field on the **Folders/Files** tab of **Session Defaults and Preferences** to create the new record.

3. Edit the new record as necessary.

   If you are using a template containing derivation fields, make sure the information is mapped correctly. If a derivation field displays in the new record, it may be because the source record did not contain the tag specified.

4. Save the new record to the database.

   For more information about Saving options in the Cataloging module, see the "Saving and Printing Information" section of the *Voyager Cataloging User's Guide*.

5. Close the new record so the source record is again active.

6. Repeat steps 2 through 5 until you have created all the necessary related records.

If you are creating many new related records but need to use more than one of your templates, do not define a default template in the Templates block. Instead, define the folder in the **Template** field on the **Folders/Files** tab of **Session Defaults and Preferences**.

This causes the **Open File** dialog box to open when you click the **New** button. At that point, you can choose the appropriate template for the current source record.

The procedure for creating a new records using a default folder is shown in Procedure 5-7, Creating New Records Using a Default Folder, on page 5-26.

Procedure 5-7. Creating New Records Using a Default Folder

Use the following to create new records using a default folder.

1. Search for and display the source bibliographic record.

2. Click the **New** button.

Result: The **Select Bibliographic Template** dialog box opens.

3. Select the appropriate template file and click **Open** (or double-click the template file).

   The system automatically uses the template you selected to create the new record.

4. Edit the new record as necessary.

   If you are using a template containing derivation fields, make sure the information a mapped correctly. If a derivation field displays in the new record, it may be because the source record did not contain the tag specified.

5. Save the new record to the database.

   For more information about Saving options in the Cataloging module, see the “Saving and Printing Information” section of the *Voyager Cataloging User’s Guide*.

6. Close the new record so the source record is again active.

7. Repeat steps 2 through 6 until you have created all the necessary related records.

Diacritics and Non-Roman Characters

6

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Diacritics and Non-Roman Characters

6

Introduction

Voyager supports Unicode™ in the Cataloging client. This provides the capability to enter diacritic and non-Roman characters in MARC records.

There are several methods for entering diacritic and non-Roman characters in Voyager MARC records such as the following.

- Special Character Entry
- Special Character Mode
- Cut & Paste from another program such as the Microsoft Character Map
- Customize Regional Options to input non-Roman characters from a different language
- Import MARC records with diacritic and non-Roman characters

Special Character Entry

The procedure for entering diacritic or non-Roman characters using **Special Character Entry** is shown in Procedure 6-1, Special Character Entry, on page 6-2.

Procedure 6-1. Special Character Entry

Use the following to enter a diacritic or non-Roman character with **Special Character Entry**.

1. Select **Special Character Entry** (**Ctrl+E**) from the **Edit** menu.

   Result: The **Special Character Entry** dialog box opens. See Figure 6-1.

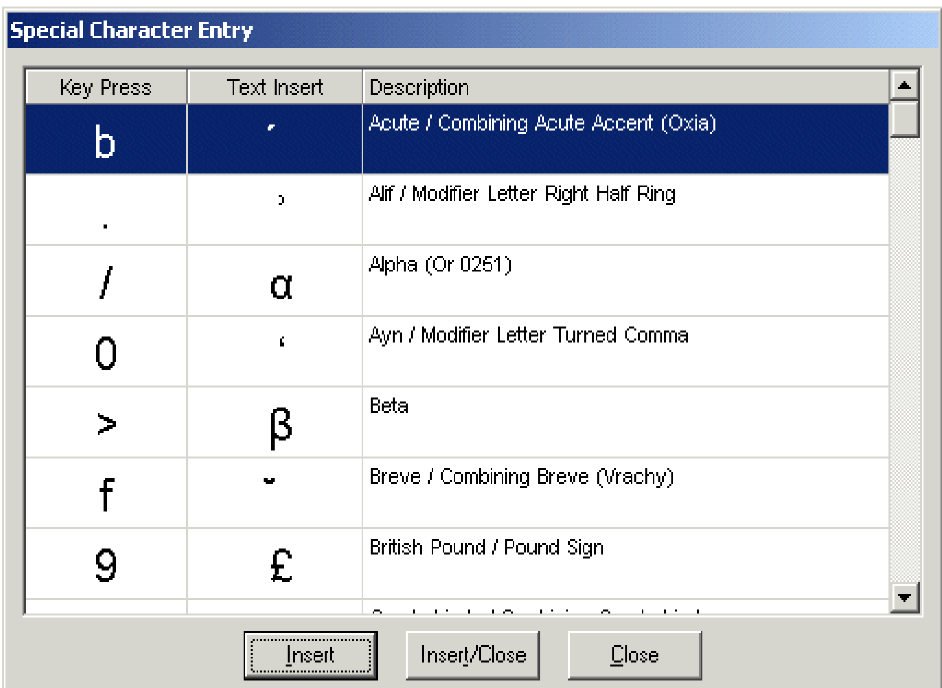

Figure 6-1. Special Character Entry

2. Select the diacritic character and click **Insert** or **Insert/Close**.

   Result: This inserts the character in the MARC record and leaves the **Special Character Entry** dialog box open or closed, respectively.

Special Character Mode

The procedure for entering a diacritic or non-Roman character using **Special Character Mode** is shown in Procedure 6-2, Special Character Mode, on page 6-3.

Procedure 6-2. Special Character Mode

Use the following to enter a diacritic or non-Roman character with **Special Character Mode**.

1. Select **Special Character Mode** from the **Edit** menu.

   Result: Special Character displays in the status bar of the Cataloging module.

2. Type the character that maps to the character you want to enter into the MARC record. See Table 6-1.

   Result: This enters the diacritic or non-Roman character into the MARC record.

3. Select **Special Character Mode** from the **Edit** menu.

   Result: This turns off **Special Character Mode** and returns you to your normal mode of entry.

Special Character Mode Mapping

The keyboard equivalents for entering diacritic and non-Roman characters in **Special Character Mode** is shown in Table 6-1.

NOTE:
The file of Special Character Mode characters can be customized to match your institution's preferences and may not exactly match the list shown in Table 6-1. See Special Characters.cfg on page 6-7 for more information.

Table 6-1. Special Character Mode Mapping - Diacritic & Non-Roman Characters

Description	Diacritic / Non-Roman Character	Keyboard Equivalent
Script l	ℓ	<space>
Polish L	Ł	!

Table 6-1. Special Character Mode Mapping - Diacritic & Non-Roman Characters

Description	Diacritic / Non-Roman Character	Keyboard Equivalent
Scandinavian O	Ø	"
D with Crossbar	Đ	#
Icelandic Thorn	Þ	$
AE Digraph	Æ	%
OE Digraph	Œ	&
Miagkii Znak	ʹ	’
Dot at Midline	·	(
Musical Flat	♭	)
Patent Mark	®	*
Plus or Minus	±	+
O Hook	Ơ	’
U Hook	Ư	-
Alif	ʾ	.
alpha	α	/
Ayn	ʿ	0
Polish l	ł	1
Scandinavian o	ø	2
d with Crossbar	đ	3
Icelandic thorn	þ	4
ae Digraph	æ	5
oe Digraph	œ	6
Tverdii Znak	ʺ	7
Turkish i	ı	8
British Pound	£	9
eth	ð	:
Dagger	†	;
o Hook	ơ	<
u Hook	ư	=
Beta	β	>

Table 6-1. Special Character Mode Mapping - Diacritic & Non-Roman Characters

Description	Diacritic / Non-Roman Character	Keyboard Equivalent
Gamma	γ	?
Superscript 0	^{0}	@
Superscript 1	^{1}	A
Superscript 2	^{2}	B
Superscript 3	^{3}	C
Superscript 4	^{4}	D
Superscript 5	^{5}	E
Superscript 6	^{6}	F
Superscript 7	^{7}	G
Superscript 8	^{8}	H
Superscript 9	^{9}	I
Superscript +	$^{+}$	J
Superscript -	$^{-}$	K
Superscript (	$^{(}$	L
Superscript)	$^{)}$	M
Subscript 0	$_{0}$	P
Subscript 1	$_{1}$	Q
Subscript 2	$_{2}$	R
Subscript 3	$_{3}$	S
Subscript 4	$_{4}$	T
Subscript 5	$_{5}$	U
Subscript 6	$_{6}$	V
Subscript 7	$_{7}$	W
Subscript 8	$_{8}$	X
Subscript 9	$_{9}$	Y
Subscript +	$_{+}$	Z
Subscript -	$_{-}$	[
Subscript (	$_{(}$	\
Subscript)	$_{)}$	]

Table 6-1. Special Character Mode Mapping - Diacritic & Non-Roman Characters

Description	Diacritic / Non-Roman Character	Keyboard Equivalent
Pseudo Question Mark	ʔ	‘
Grave	ˋ	a
Acute	ˊ	b
Circumflex	ˆ	c
Tilde	˜	d
Macron	¯	e
Breve	˘	f
Dot Above	˙	g
Umlaut	¨	h
Hacek	ˇ	i
Angstrom	˚	j
Ligature left	︠	k
Ligature right	︡	l
High Comma off center	ʼ	m
Double Acute	˝	n
Candrabindu	̐	o
Cedilla	¸	p
Hook Right	̜	q
Dot Below	̣	r
Double Dot Below	̤	s
Circle Below	̥	t
Double Underscore	̳	u
Underscore	_	v
Hook Left	˛	w
Right Cedilla	̦	x
Upadhmaniya	̮	y
Double Tilde first half	︢	z
Double Tilde second half	︣	{
High Comma Centered	̓	~

Table 6-1. Special Character Mode Mapping - Diacritic & Non-Roman Characters

Description	Diacritic / Non-Roman Character	Keyboard Equivalent
Degree	°	Shift-F1
Phonocopyright	℗	Shift-F3
Copyright	©	Shift-F4
Sharp	#	Shift-F5
Inverted ?	¿	Shift-F6
Inverted !	¡	Shift-F7

Special Characters.cfg

The Special Characters.cfg file located in the Catalog folder in the Cataloging module installation directory may be customized to contain character mappings that can be used with the **Special Character Mode** in the Cataloging module. By default, the file is installed with the mappings identified in Table 6-1.

This file is encoded in Latin-1. Any characters outside the Latin-1 character set may be referenced in the Special Characters.cfg file using XML entity references.

An XML entity reference is in the format `&#x1234` where 1234 is the hexidecimal representation of the Unicode (UTF-8) character.

IMPORTANT:
Literal commas in any field in this file must be encoded using the XML entity reference form. The XML entity reference for the comma is `,`*. Entity references may appear in either hexadecimal or decimal notation.*

File Contents

The Special Characters.cfg file is a list of comma separated values. Each entry contains three comma separated fields. This file may contain tabs for readabiltiy.

First Field

The first field contains the value of the keyboard key that accesses the entry.

If this field is empty, the entry is only available using the Special Characters Entry form.

The first field may only contain ASCII graphic characters with code points from 32 through 127 decimal.

This field may only contain a single character.

Second Field

The second field contains the text to insert into the field of the MARC record.

This field may contain characters from Latin-1. Any characters from outside the Latin-1 character set must be encoded in XML entity reference format.

This field may contain an arbitrary amount of text. It is possible for this field to contain a lengthy block of text (approximately 80 characters). Although, the default file contains single-character entries.

Third Field

The third field contains a description of the entry. This field is optional.

It may contain Latin-1 characters and entity references.

This field may be 80 characters in length.

Microsoft Character Map

The Microsoft Character Map can be used to cut and paste non-Roman characters needed for Cataloging input.

Use the following path to access the Microsoft Character Map.

Start>Programs>Accessories>System Tools>Character Map

For more information about the Microsoft Character Map use the Microsoft Help and reference materials on this topic.

Regional Options for Non-Roman Characters

Microsoft provides operating-system-level regional language options that provide another alternative for entering non-Roman character.

Use the following path to access the Microsoft Regional Options.

Start>Settings>Control Panel>Regional Options

For more information on this topic use the Microsoft Help and reference materials.

Importing Records with Non-Roman Characters

Information about considerations for importing Non-Roman characters can be found in BulkImport on page C-8 and also in the *Voyager Technical User's Guide*.

Other Diacritic Considerations

Other diacritic considerations can be found in Diacritics and MARC21 Compliance Considerations on page C-3.

Pick and Scan

7

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Pick and Scan

7

Introduction

Pick and Scan is a feature within Voyager's Cataloging module designed to facilitate mass changes to item records and associated holdings records. Pick and Scan allows authorized staff to change, delete, or clear data with the simple wand of an item barcode or by processing a file that lists a group of barcodes.

Adhering to all operator security profiles including owning library security, Pick and Scan enables authorized operators to change the following.

- Holding location
- Permanent location
- Temporary location
- Permanent type
- Temporary type
- Media type
- Item status
- Statistical categories

Pick and Scan is an especially useful tool for libraries undertaking significant inventory and maintenance projects by making it possible for staff to use scanning technology, hand-held devices, and/or batch files for processing large groups of changes.

Using Pick and Scan

The procedure for using Pick and Scan is shown in Procedure 7-1, Using Pick and Scan, on page 7-2.

Procedure 7-1. Using Pick and Scan

Use the following to work with the Pick and Scan feature.

1. Click **File>Pick and Scan** or **Ctrl+I**.

   Result: The **Pick and Scan** dialog box opens. See Figure 7-1.

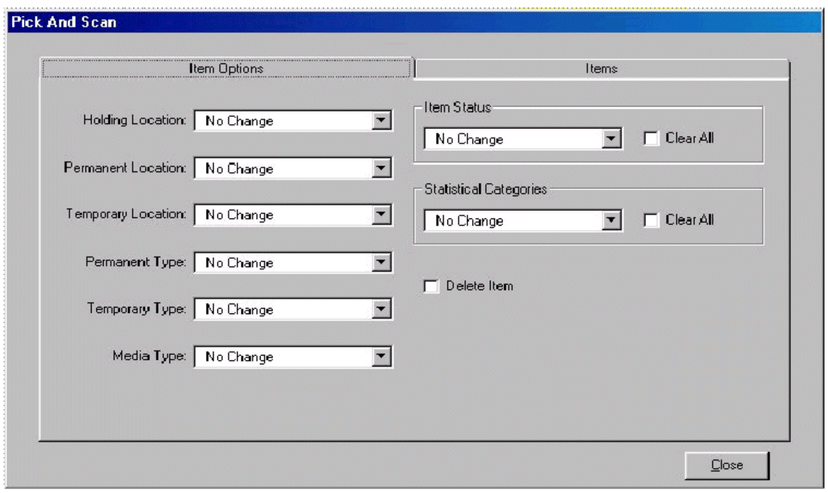

Figure 7-1. Pick and Scan dialog box

NOTE:
In order for staff to have access to Pick and Scan, one or more of the following minimum security authorizations must be specified.

- Update Item Records
- Delete Item Records
- Update Holdings Records

Depending on the operator's security level, not all Pick and Scan options may be available. If, for example, an operator doesn't have **Delete Item Record** privileges, the **Delete Item** check box is inactive.

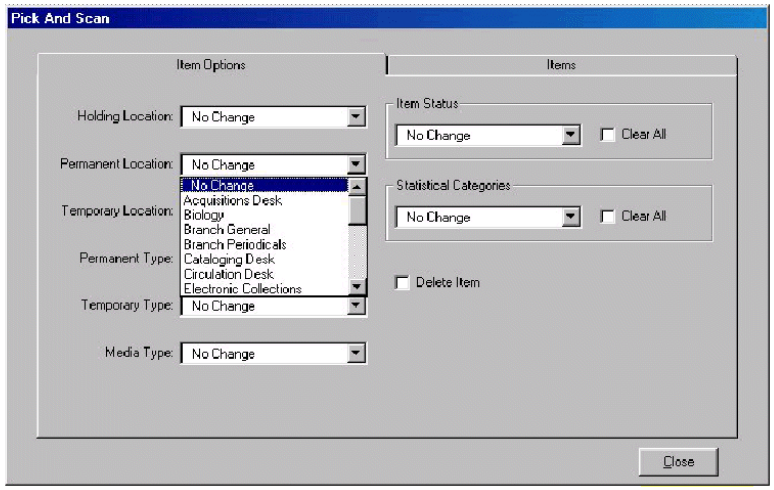

Figure 7-2. Permanent Location options

2. Select the desired change(s) from the options on the **Item Options** tab. Click the **drop-down arrow** next to the desired option to view available choices. Use the check boxes to clear or delete item information. For examples, see Figure 7-2 and Figure 7-3.

TIP:
*When making changes to **Permanent Location**, you may also want to simultaneously change the **Holding Location**.*

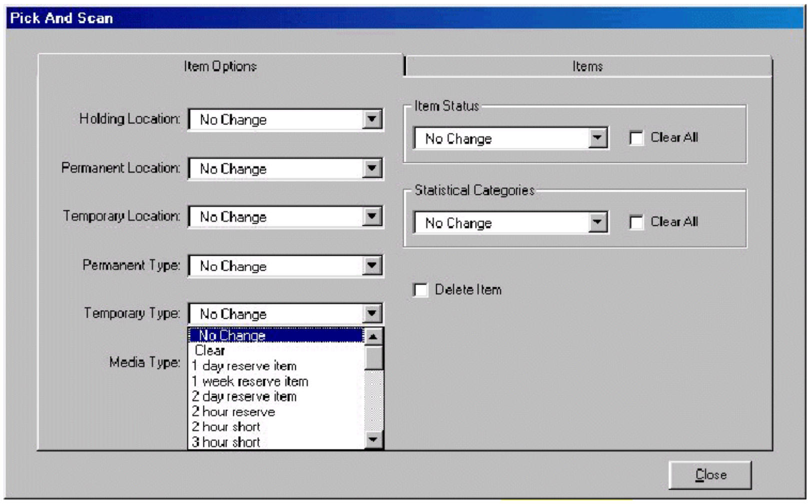

Figure 7-3. Temporary Type options

IMPORTANT:
*When the **Delete** option is selected, a pop-up warning message displays. This is the only notification received for the deletion request. See Figure 7-4.*

Figure 7-4. Delete warning message

The drop-down lists display the locations stored in the operator's security profile. The default option in all cases is **No Change**, and **Clear** is provided as an option for non-required fields in the item record.

Required fields include the following fields.

- Holding Location
- Permanent Location

- Permanent Type

NOTE:
Pick and Scan modifications to the **Holding Location** option change the MFHD 852 ‡b.

The **Permanent Type** and **Temporary Type** drop-down lists display the type values stored in *Voyager System Administration* for **Item Types**.

The **Media Type** drop-down list displays the type values stored in *Voyager Media System Administration* within **Media Types**.

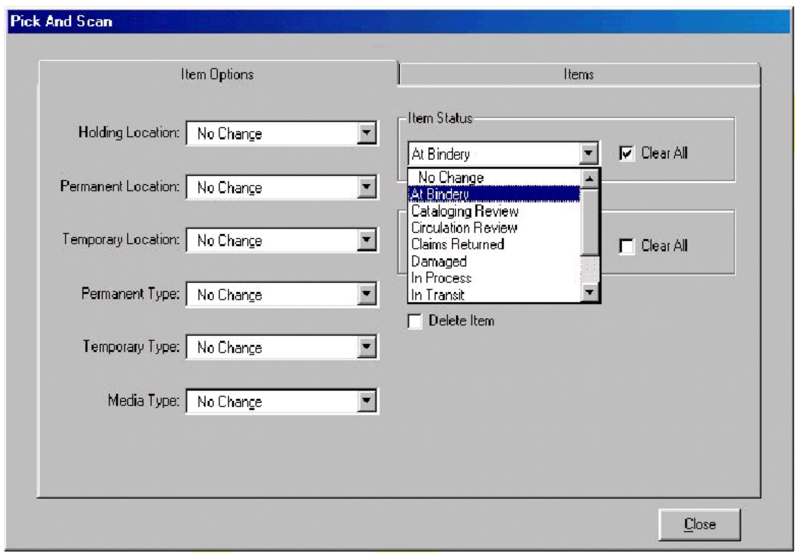

Figure 7-5. Item Status/Clear All single step

Especially noteworthy is the **Clear All** option for **Item Status** and **Statistical Categories**. The **Clear All** option allows operators to clear any current, non-system-applied status or statistical category and apply a new one in a single step. See Figure 7-5.

Also, notice that the **Item Status** drop-down list is only composed of non-system-applied statuses. It is not possible, for example, to remove a Charged status from an item. The Item Status List includes:

- At Bindery
- Cataloging Review
- Circulation Review

- Damaged
- In Process
- In Transit
- Lost--Library Applied
- **Missing**
- **Withdrawn**

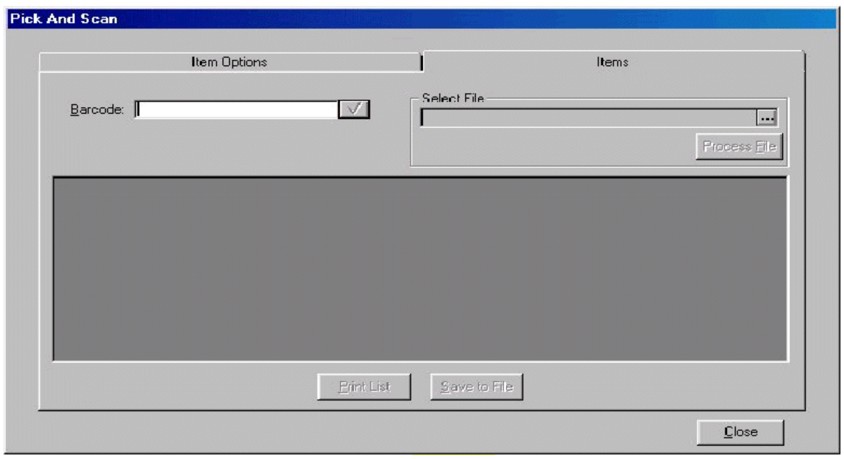

Figure 7-6. Items tab

3. Click the **Items** tab. See Figure 7-6.

4. Enter the identifying item information in the **Barcode** text box or the name of the file in **Select File** to process a batch of items.

5. Click the check mark button or press **Enter** to process individual Barcode entries in the **Barcode** text box or click the **Process File** button to begin batch processing from a text file.

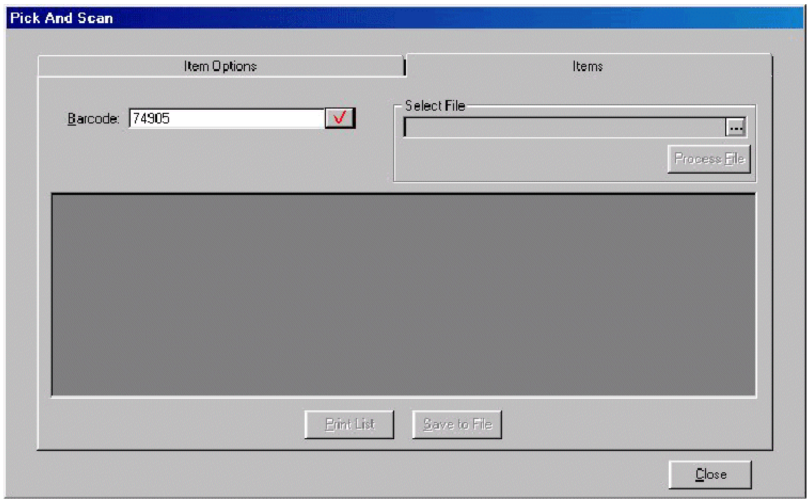

Figure 7-7. Barcode text box

See Figure 7-7 and Figure 7-8 regarding the **Barcode** text box processing method and Figure 7-9 and Figure 7-10 regarding the **Select File** processing method.

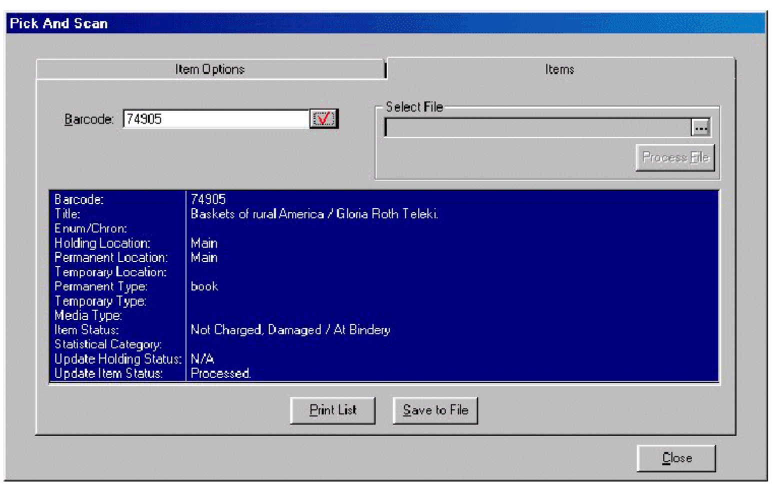

Figure 7-8. Check mark button

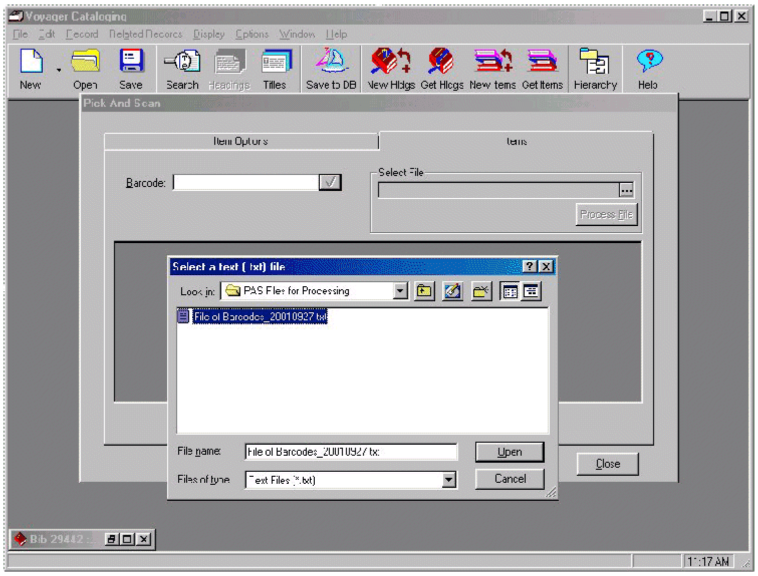

Figure 7-9. Select File ellipsis

TIP:
Click the ellipsis button to access the directory of files. See Figure 7-9.

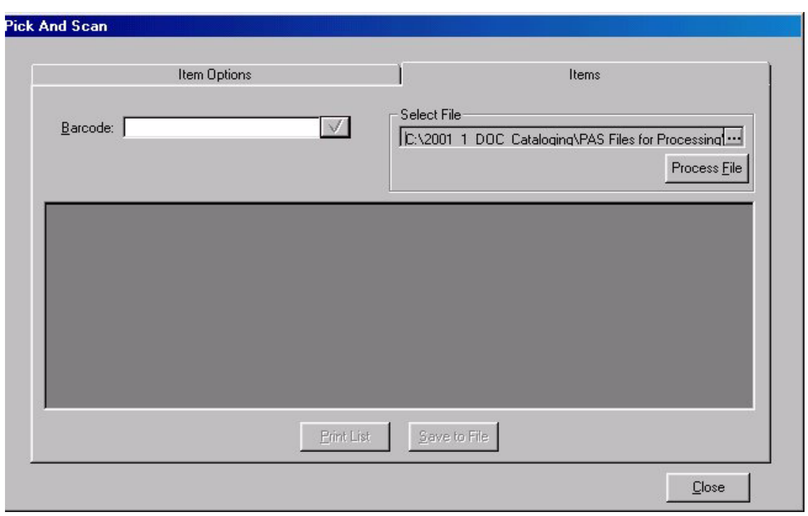

Figure 7-10. Filename (path) entered

NOTE:
The file of barcodes created for batch processing must be a Windows (not UNIX) file delimited by carriage returns. That is, each barcode must be separated by carriage return. See Figure 7-10 and Figure 7-11.

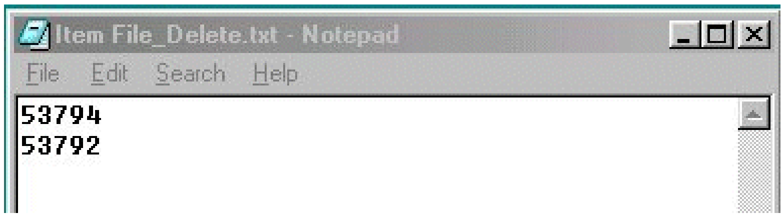

Figure 7-11. Carriage-return-delimited file

OPTIONAL:

6. *Click **Print List** or **Save to File** (`.txt` file type) to capture the Processing Report displayed as in Figure 7-12.*

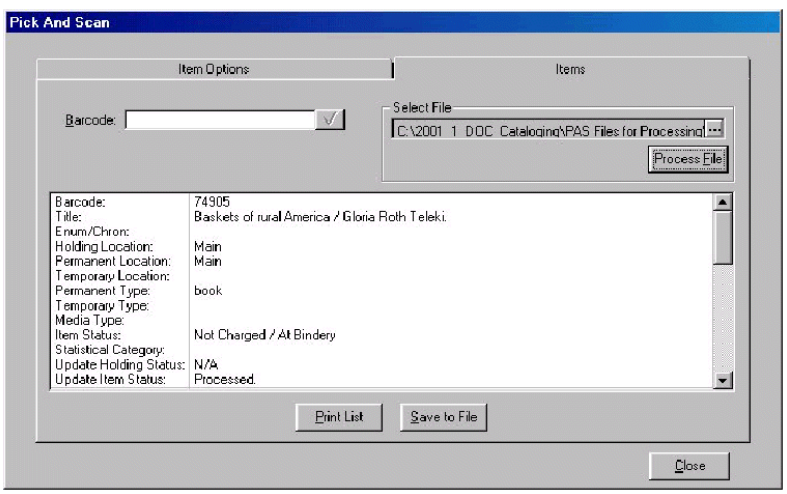

Figure 7-12. Processing report window

The bottom half of the **Pick and Scan** dialog box, a scrolling window, displays basic item information of scanned items and any error messages that may accompany the action specified.

Basic item information displayed in the Processing Report includes the following.

- Title
- Enum/chron
- Barcode
- Location
- Status

Any item field that has changed as a result of processing displays the before and after values separated by a slash. All successfully completed transactions are indicated with a status of Processed. Values that have been cleared display as <cleared>. Whenever a non-existent item barcode is entered, the Processing Report indicates that, too. See Figure 7-13.

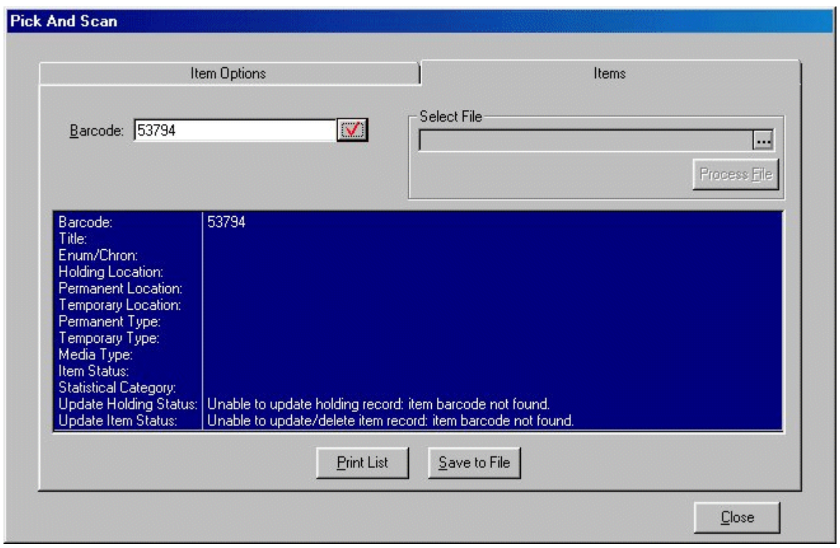

Figure 7-13. Item barcode not found

One of the following general statuses is provided in the Processing Report.

- **Processed.**
- **Unable to update item record because duplicate barcodes exist.**
- **Unable to update item record because barcode not found.**
- **Unable to read file format.**

NOTE:
After the operator closes the Pick and Scan session, the Processing Report information is cleared and no longer available.

TIP:
Use the Processing Report to locate errors in the Windows barcode file used in Pick and Scan batch processing. The scrolling window keeps track of everything processed up to the point of any error. By comparing the Processing Report with the Windows file of barcodes, the operator can determine where to resume batch processing.

7. Click **Close** when Pick and Scan processing is complete.

Templates

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Templates

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Introduction

A template allows you to use a pre-defined MARC record to create new records easily. Before you can create a record, there must be at least one template in the template directory in the Voyager directory. Voyager provides you with three templates.

- bib.tem
- auth.tem
- hold.tem

These templates should not be deleted.

- The procedure for creating a new template is shown in Procedure 8-1, Creating a New Template, on page 8-2.
- The procedure for editing a template is shown in Procedure 8-2, Editing a Template, on page 8-2.
- The procedure for deleting a template is shown in Procedure 8-3, Deleting a Template, on page 8-3.

NOTE:
Templates cannot be retroactively applied to an existing record.

Creating, Editing, and Deleting Templates

The procedure for creating a new template is shown in Procedure 8-1, Creating a New Template, on page 8-2.

NOTE:
You must have at least one template for each type of record that you want to create such as `bib.tem`, `auth.tem`, or `hold.tem`.

Procedure 8-1. Creating a New Template

Use the following to create a new template.

1. Select **File>Template>New**.

2. Select the record type (Authority, Bibliographic, or Holdings) and click **OK**.

   Result: The system template for the record type you selected is displayed.

3. Create the new template by completing the **Leader**, fixed fields, and variable fields. For more information on these fields, see the section about that particular record type. For more information, see Bibliographic Records on page 2-3, Authority Records on page 2-28, and Holdings Records on page 2-36.

4. Select **File>Save As...**. Enter the name you want for your template. The suffix for the file must be `.tem`.such as `thesis.tem` for example.

   NOTE:
   When a template is saved, it is not validated against authority records or the MARC tag table.

The procedure for editing a template is shown in Procedure 8-2, Editing a Template, on page 8-2.

Procedure 8-2. Editing a Template

Use the following to edit a template.

1. Select **File>Template>Edit**.

2. Select the template you want to edit and click **Open**.

   Result: The template you selected opens.

3. Edit the template by changing the **Leader**, fixed fields, and variable fields. For more information on these fields, see the section about that particular record type. For more information, see Bibliographic Records on page 2-3, Authority Records on page 2-28, and Holdings Records on page 2-36.

   To edit the template, you can use the same commands as you use for editing a record. See Edit Menu on page 10-20 for more information.

4. Select **File>Save** to save the template with the same name. Select **File>Save As...** to save the template with a different name. If you use Save As..., the suffix for the file must be `.tem`.

   NOTE:
   When a template is saved, it is not validated against authority records or the MARC tag table.

The procedure for deleting a template is shown in Procedure 8-3, Deleting a Template, on page 8-3.

Procedure 8-3. Deleting a Template

Use the following to delete a template.

1. Select **File>Template>Edit**.

2. Select the template you want to delete and click **Open**.

   Result: The template you selected displays.

3. Select **File>Template>Delete**. Voyager will ask you if you really want to delete the selected template.

4. Click **OK** to delete the selected template, or click **Cancel** to close the dialog box without deleting the selected template.

Authority Control

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Authority Control

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Introduction

When you select **Record>Save to Database**, Voyager's Cataloging module can automatically validate the current record against the appropriate authority record. Fields that are subject to authority control (such as authors, series, and subjects), are checked against authority records in your database.

Depending on what option is selected on the **Validation** tab in Session Defaults and Preferences (see Session Defaults and Preferences on page 10-1), one of the following occurs.

- If all headings are valid or if **Bypass Authority Control** is selected, the record is saved to the database.
- If there are invalid headings and you have not selected **Display all the headings**, the **Authority Validation** dialog box opens and lists only the headings without an authority record.
- If there are invalid headings and **Display all the headings** is selected, the **Authority Validation** dialog box opens and lists all of the headings whether they are valid or not such as no authority record.

NOTE:
If you want to save bibliographic records in your current session to the database without running Authority Control Validation, you can check the **Bypass Authority Control Validation** option in **Options>Session Defaults**. Otherwise, all invalid headings must be resolved or overridden by clicking the **Continue** button on the **Authority Validation** dialog box (Figure 9-1) before the record is saved to the

database. However, the database requires that in all variable length fields each subfield indicator is followed by text even if this option is selected. A single space following the indicator is a sufficient amount of text.

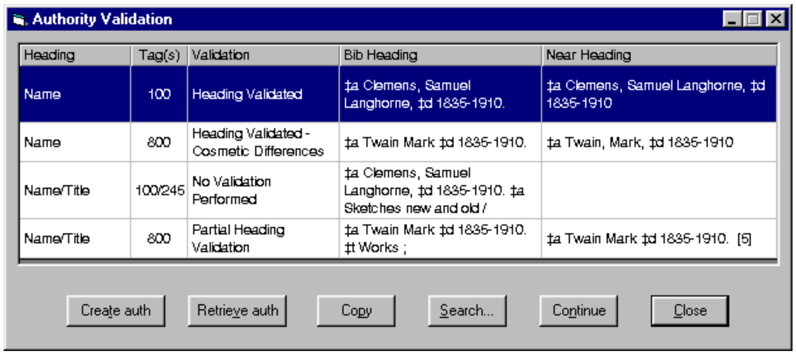

Figure 9-1. Authority Validation dialog box

Columns on the Authority Validation Dialog Box

The following columns (see Table 9-1) display in the **Authority Validation** dialog box.

Table 9-1. Authority Validation Dialog Box

Column	Description
Heading	Name, Title, Name/Title, or Subject.
Tag(s)	MARC record tags being validated.

Table 9-1. Authority Validation Dialog Box

Column	Description
Validation	Displays the results for validation of each tag in the record. • Heading Validated - an exact match was made • Cosmetic Differences - the record matches except for differences in punctuation • Partial Heading Validation - some of the subfields (but not all) match a heading • No Heading Validated - a match could not be found to validate the heading **NOTE:** Partial Validation works by trying to make an exact match of the subfields of the record. If it does not, it removes the rightmost subfield and performs a match based on that information. It repeats this until it makes a match or it runs out of fields, at which point it returns `No Heading Validated`. Partial Validation does not match based on close matches of a subfield. For example if you validate "‡a Mississippi River," a partial match never identifies "‡a Mississippi River Authority" as a candidate. For that type of matching, you must highlight the heading and click **Search** to perform a browse headings search which will list all the headings that closely but not exactly match that heading.
Bib Heading	The bibliographic heading with subfield diameters.
Near Heading	The bibliographic heading in the database that most closely matches the heading under validation. The following may display in the **Near Heading** column. • The column may be blank indicating that the heading does not match • The heading may display in a normalized form (and matches the authority heading) • The headings do not match partially, or they are from another index

Buttons on the Authority Validation Dialog Box

The following buttons (see Table 9-2) display on the **Authority Validation** dialog box.

Table 9-2. Authority Validation Dialog Box

Button	Description
Create auth	This button allows you to generate a new Authority record. The NUC code in the 040 comes from the Cataloging location's Owning Libraries NUC code. The Authority record's location must correspond to the Owning Libraries Location. To activate the **Create auth** button, you must first select the error in the **Authority Validation** dialog by clicking the row label (the grey, left column). When you click the **Create auth** button, the **New Authority Record** dialog box opens. The record that is created here is not based on the template specified in Session Preferences. It uses a standard established by the Library of Congress. For more detailed information see the web site: `http://lcweb.loc.gov/catdir/pcc/strawn.html`.
Retrieve auth	This button is disabled if the heading selected has no associated authority record. It is used to retrieve an authority record when one exists.
Copy	This copies the selected Heading text to the clipboard. To activate the **Copy** button, you must first select the error in the **Authority Validation** dialog by clicking the row label (the grey, left column).You can then paste the Heading into the new authority record using **Edit>Paste** or the **Ctrl+v** function.
Search	This button allows you to search for authority headings using the standard **Search** dialog. A browse search is launched with the search argument being the selected heading. If you select a heading from the browse list and click **Copy**, the heading is copied to the clipboard. You can then return to the record and add the heading information by selecting a point in the variable field and clicking **Paste**. **NOTE:** If the heading selected is a subdivision, the search performed is a regular find search rather than a browse.

Table 9-2. Authority Validation Dialog Box

Button	Description
Continue	This overrides all of the authority validation errors and allows Voyager to save the record to the database. This button does not create authority records for the unauthorized headings.
Close	This button closes the **Authority Validation** dialog box.

Global Headings Change and Preview Queue

An authority record, the 100-185 fields, contains an established name, title, name/title subdivision, or subject. Voyager's Global Headings Change process is a combination of client interface and batch jobs on the server that process the changes you make to an authority heading. When a change is made and saved to the database, you can view all of the affected heading changes in the **Global Headings Change Queue** activity of the Voyager Cataloging module (select from the **File** menu in the Cataloging main menu). You must have the proper security profile in System Administration to make these changes.

When a change to an authority heading or subdivision type (initial subfield delimiter or 18x tag of the subdivision) is made, the **Global Headings Change Queue** expands to a hierarchical tree, displaying all of the changes to the Authority heading as well as the associated authority fields or records. You can view the proposed changes, see the other information that is affected, and finally mark the changes that you want implemented.

NOTE:
Traced and untraced reference authority headings may be changed by the **Global Headings Change Queue**.

Each of the three branches of the tree (see Table 9-3 for a description) represents a different aspect of the authority heading information.

Table 9-3. Tree Descriptions

Tree Level	Description
First level	Displays the original authority record prior to changes, the 1xx or 18x.
Second level	Displays the modified 1xx or 18x heading, the affected headings in bibliographic records, and the bib record affected by the change.

Table 9-3. Tree Descriptions

Tree Level	Description
Third level	Displays all authority headings affected by the changed 1xx or 18x heading in level one. Those headings affected include the 1xx, 4xx, or 5xx fields. **NOTE:** If a 4xx displays in the third level and its level one heading is not a subdivision (for example, you have a 4xx pointing to a 1xx that is the same as the 4xx), it is a sign of a conflicting authority record.

The levels of the tree are shown in Figure 9-2.

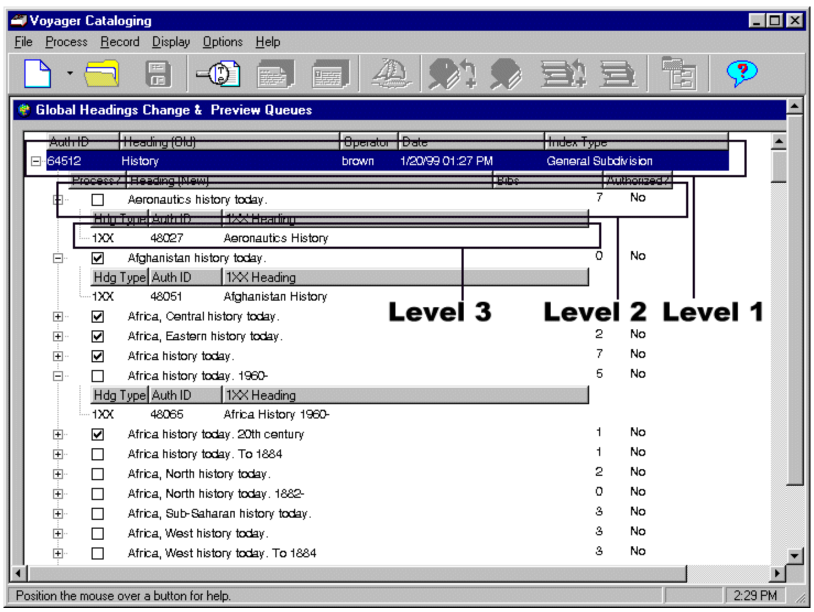

Figure 9-2. Global Headings Change Queue Tree Levels

In order for Global Headings Changes to be completed, three batch processing jobs must be run. They must be run in the following order.

1. Job 11
2. Job 12
3. Job 13

For more information, see the *Voyager Technical User's Guide.*

Each job only processes records that have had the previous job run on them. If you run the same job consecutively, it is ignored the second time.

The **Bibs** column (bibliographic count) that displays in level two of the **Global Headings Change Queue** tree indicates the number of times the authority heading occurs in a bibliographic record. The bibliographic count that displays in the preview queue displays the number of bibliographic records to be processed with the new heading. See Figure 9-3.

IMPORTANT:
Any records to be processed through the Global Headings Change Queue must not be manually changed between each step of the batch job. If changes are made manually, the records in which changes were made are removed from the queue.

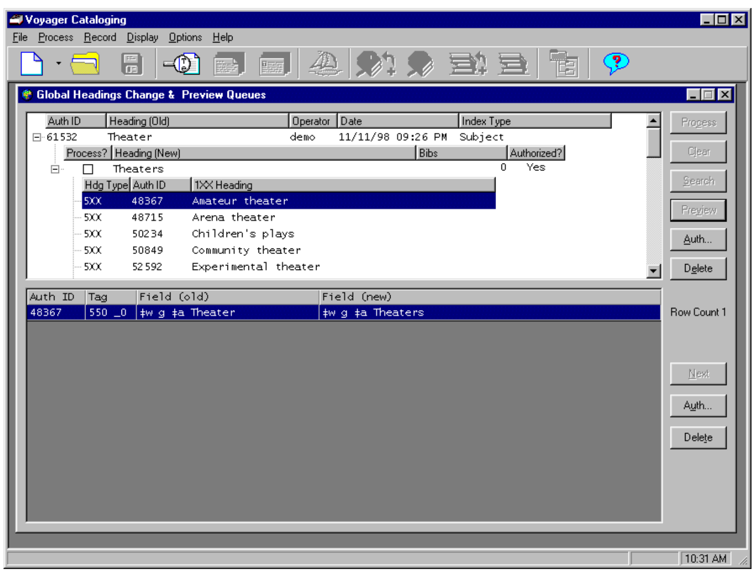

Figure 9-3. Global Heading Change & Preview Queues

NOTE:
If you have a bibliographic record with a name/title heading that, for example, contains both a 1xx and a 240, 243, or 245 or it contains a 400, 410, 411, 700, 710, 711, 800, 810, or 811, it is only changed if an authority record which contains a name/title heading is changed. If a non-name/title authority record such as a

name authority heading with a matching 1xx heading is changed, this has no effect on a name/title bibliographic record.

For example, suppose you have a bibliographic record that contains the following.

```
100  ‡a Adams, John Q.
243  ‡a My life with Abigail : a biography
```

You also have authority record #1 that has the name but not the title in the 1xx, as in the following example.

```
100  ‡a Adams, John Q.
```

If you change the 100 ‡a of authority record #1 to Adams, John Quincy, the above bibliographic record is not changed.

Assume you have an authority record #2 that contains a name/title heading, such as the following example.

```
100  ‡a Adams, John Q.  ‡t My life with Abigail : a
biography
```

If you changed the 100 ‡a of authority record #2 to Adams, John Quincy, that change is reflected in your bibliographic record.

Sample Global Headings Change Work Flow

The following is an example of the Global Change workflow.

a. A change is made to an authority heading by an online edit, online replace, import, or Bulk Import and saved to the database.

   The change is automatically queued up to the **Global Headings Change Queue.**

b. Open the queue by pressing **Ctrl + G** or by selecting **File>Global Headings Change** from the main menu.

   The heading that is visible is the old authority heading, before it was changed. The Authority record can be viewed by clicking the heading and then clicking the **Auth...** button.

c. The first batch/server process (batch job 11) is run.

d. The first stage of change displays in the Global Headings Change Queue. You can view the heading changes that were made to the original Authority record.

e. Run the second batch job (batch job 12) and view the Global Headings Change Queue again.

f. This allows you to view changes that are to be made to authority and bibliographic records that have that heading. To see a list of bibliographic records associated with the new heading, highlight the new heading and click the **Preview** button. The bib records display in the lower portion of the **Global Headings Change** dialog box.

g. Place a check in the **process flag check box** (or highlight the new heading and click the **Process** button). The process flag marks the change to be executed by the batch job and identifies those check boxes to initiate the change.

h. Running the third batch job (batch job 13) completes the changes that have been checked and saves them to the database.

An alternative method of making these changes without the **Global Headings Change Queue** is to change the records directly. You can bring up the bibliographic records that have the old authority heading and update all of the references manually. This removes the heading from the queue.

Global Change Process

For more information on batch jobs 11-13, see the *Voyager Technical User's Guide*.

a. When a change is made to an authority record and saved to the database, the record with the change displays in the **Global Headings Change Queue** as it used to be before the changes were made. See Figure 9-4. This is the first level of heading changes in the tree structure.

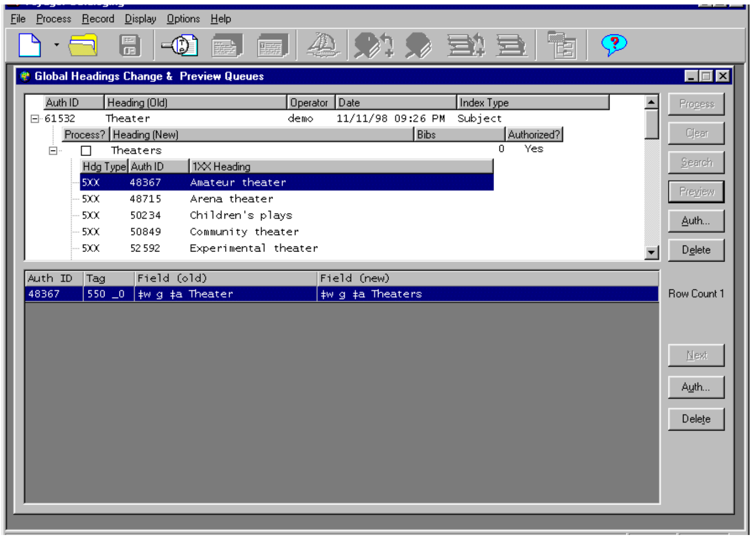

Figure 9-4. Global Heading Preview: Intial State

You can view the full Authority record in MARC format by highlighting the record and clicking the **Auth** button. See Figure 9-5.

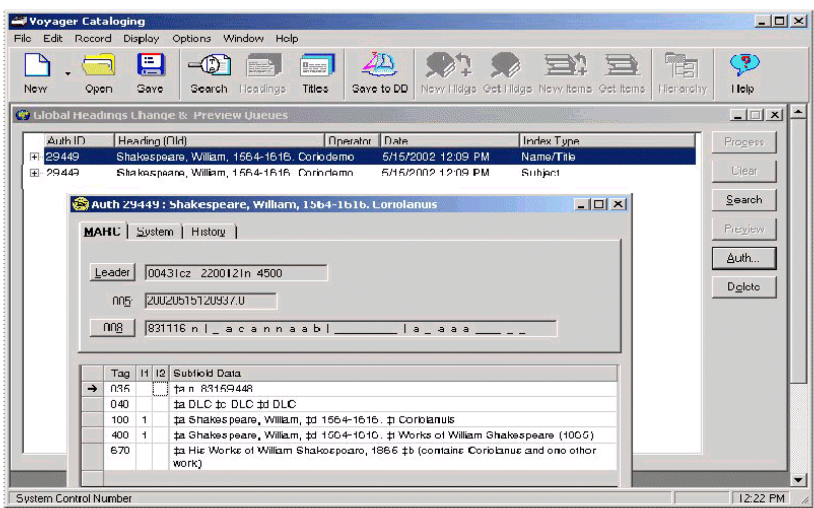

Figure 9-5. Global Change Preview: Authorities Records

b. Running the first batch job causes Voyager to add the second level of heading changes to the tree structure. These are the changes that are intended to be made. The **Process** flag displays at this level. This flag allows you to select which changes you want to have processed by the third batch job.

c. Running the second batch job causes Voyager to add the third level of headings changes to the tree structure. These are the authority record headings that would be affected by the change. This batch job creates the entries in the preview queue, displaying any Authority records with 5XX fields.

   When you view the **Global Headings Queue**, you are able to select which changes are to be processed. Each change and its corresponding updates are the result of an authority heading change.

   After running the second batch job you can also view any bibs associated with this heading by highlighting the heading and clicking the **Preview** button. This displays the changed heading, and enables the **Bib** button which displays the complete record. The top section of the **Global Headings Change Queue** only displays the old heading and the heading change.

   Before you run the third batch job, you must specify which changes you want to make by checking the Process? box.

d. Running the third batch job makes all of the changes to the bibliographic and/or authority records that had the **Process** flag turned on in the **Global Headings Queue** dialog box.

Original Heading

The first thing displayed when you open the global headings screen is the original heading. See Figure 9-6 and Table 9-4.

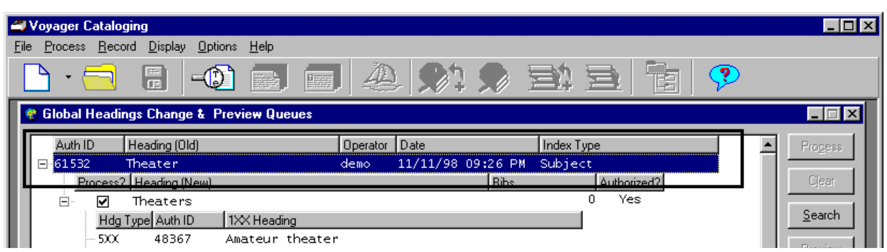

Figure 9-6. Level One of Tree: Original Heading, outlined

Table 9-4. Original Heading Information Displayed

Column	Description
Auth ID	The authority record ID of the changed heading.
Heading (old)	The original heading for the record.
Operator	The operator who made the change.
Date	The date the change was made.
Index Type	The type of heading index.

Proposed New Heading

The next thing that displays below the old heading is the new heading. See Figure 9-7 and Table 9-5. This displays the complete new heading as it will look after the changes have been made. You must check the box to the left of the new heading in order to make the change. There may be more than one proposed new heading, such as when a subdivision is changed.

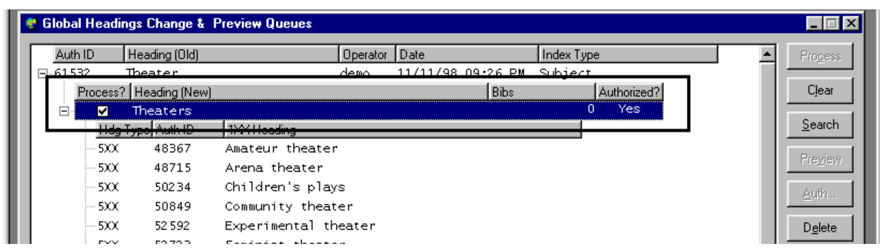

Figure 9-7. Level Two of Tree: Proposed New Heading, outlined

Table 9-5. Proposed New Heading Information Displayed

Column	Description
Process?	You can instruct the batch job to process the change by either clicking the check box or selecting the heading and clicking the **Process** button.
Heading (new)	The proposed new heading.
Bibs	The number of bibliographic records containing the old heading.

Table 9-5. Proposed New Heading Information Displayed

Column	Description
Authorized?	States whether the heading is an authorized Heading.

Affected Authority Headings

Any items that display below the new heading are the other affected authority headings (see Figure 9-8 and Table 9-6) such as a 5XX or, in the case of a subdivision change, a 1XX. Depending on the changes being made, there may or may not be any affected authority headings to be changed. That is, no affected authority headings may display in the dialog box.

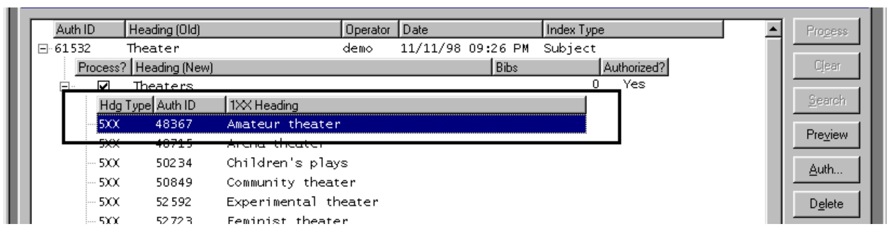

Figure 9-8. Level Three of Tree: Authority Headings outlined

Table 9-6. Authority Headings Information Displayed

Column	Description
Hdg Type	Specifies the type of heading that contains the heading being changed.
Auth ID	The authority record ID.
1XX Heading	Specifies the authorized heading.

Splitting a Heading

You may want to split a heading such as vaccine and vaccination. If 90 percent of the records will be vaccine, it might be a good idea to complete Global Change for 100 percent of the records and change the 10 percent that will go under vaccination manually.

Heading Merge

In order to merge headings, you can create a brief or provisional authority record to attach to the old headings and then change the heading and leave the old authority record there until after the Global Change. After the Global Change, you can delete the dummy authority record.

Name/Title Heading Change

If you have a bibliographic record with a name/title heading that, for example, contains both a 1xx and a 240, 243, or 245 or it contains a 400, 410, 411, 700, 710, 711, 800, 810, or 811, it is only changed if an authority record which contains a name/title heading is changed. If a non-name/title authority record with a matching 1xx heading is changed, there is no effect on the bibliographic record.

Behavior of the Dialog Box

In order to display the **Preview Change Queue**, you must highlight a new heading in the upper portion of the dialog box. Click the **Preview** button and any bib records affected by the change display in the lower portion of the dialog box. If more than 250 bib records are affected by the change, the first 250 records display. Click the **Next** button to retrieve the remainder of the bib records. If you make any changes such as deleting a record, the count only reflects the number displayed compared to the number remaining that you have not retrieved. Only when you have retrieved all of the records does the count reflect the real total in the queue.

Buttons

The following (Table 9-7) describes the different button options.

Table 9-7. Button Descriptions

Button	Description
Process	Highlight the new heading by clicking it and click the **Process** button to flag the row to save changes to the database in a batch job.
Clear	Highlight the heading by clicking it and then click the **Clear** button to prevent the batch program from processing the heading such as remove the **Process** flag.

Table 9-7. Button Descriptions

Button	Description
Search	Performs a browse search on the original heading or old heading. Saving a record to the database allows you to search it. **NOTE:** If the heading selected is a subdivision, the search performed is a regular find search rather than a browse.
Preview	Display any heading change by selecting it and clicking **Preview**.
Auth	Displays the authority record.
Delete	Deletes the selected changes from the **Global Headings Change Queue**.

When bib records are displayed after clicking the **Preview** button, the following buttons (see Table 9-8) display with the bib records in the lower portion of the dialog box.

Table 9-8. Button Description for Preview Display

Button	Description
Next	Retrieves more bib records if more than 250 records are affected by the heading change.
Bib	Displays the bibliographic record.
Delete	Removes a bib record from the preview list. It will not be included in the heading change.

Global Headings Batch Job

See the *Voyager Technical User's Guide* for a description of how to run each of the Global Headings batch jobs. Refer to jobs 11, 12, and 13 of the Cataloging batch job.

Session Defaults and Menu Options

10

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Session Defaults and Menu Options

10

Session Defaults and Preferences

You can access the **Session Defaults and Preferences** dialog box by selecting **Options>Preferences**. From this dialog box, you can change a number of defaults which are presented on several tabs.

- General
- Validation
- Work Flow
- Item Defaults
- Folders
- Mapping
- Colors/Fonts

After you select your defaults, click **OK** to accept them or click **Cancel** to close the dialog without applying any of your selections.

The defaults you choose are saved when you exit the Cataloging module. Preferences are machine specific. If more than one person uses the same workstation, each person uses the same defaults.

General Tab

Customize the options on the **General** tab (see Figure 10-1) to match your preferences using Table 10-1 for a description of each option.

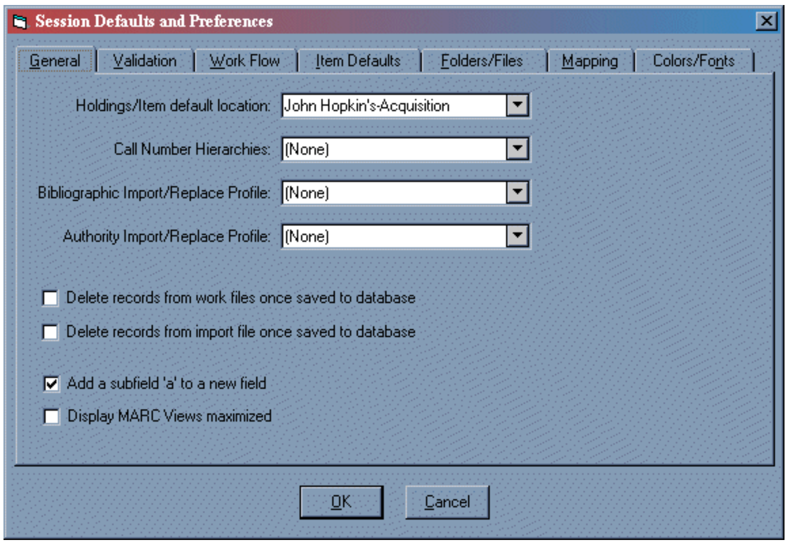

Figure 10-1. Cataloging Session Defaults and Preferences: General tab

Table 10-1. General tab options for Session Defaults and Preferences

Options	Description
Holdings/Item default location	Select the default location for all holdings and item records that you create by clicking the drop-down arrow.
Call Number Hierarchies	Select the call number hierarchy which is used to pull call number information from a bib record into a holdings record. You can also select **None** from the list of options.

Table 10-1. General tab options for Session Defaults and Preferences

Options	Description
Bibliographic Import/ Replace Profile	Select the appropriate Import/Replace profile from this drop-down menu. These profiles are defined by your system administrator and specify what actions are taken when duplicate records are found during an import. If your profile removes records that are currently in the database and replaces them with the imported record, or merges the existing record with a new record, the old records are archived on the server in the file `replace.<recordtype>.marc`. If your profile does not replace records that are currently in the database, the imported duplicate records are archived on the server in the file `discard.<recordtype>.marc`. Records rejected because they don’t match are archived in the file `reject.<recordtype>.marc`. To access the deleted and discarded files on the server, or for more information on specific profiles, refer to "Bibliographic Duplicate Detection Profiles" in the *Voyager System Administration User’s Guide*.
Authority Import/ Replace Profile	Select the appropriate Import/Replace profile from this drop-down menu. These profiles are defined by your system administrator and specify what actions are taken when duplicate records are found during an import. If your profile removes records that are currently in the database and replaces them with the imported record, or merges the existing record with a new record, the old records are archived on the server in the file `replace.<recordtype>.marc`. If your profile does not replace records that are currently in the database, the imported duplicate records are archived on the server in the file `discard.<recordtype>.marc`. Records rejected because they don’t match are archived in the file `reject.<recordtype>.marc`. To access the deleted and discarded files on the server, or for more information on specific profiles, refer to "Authority Duplicate Detection Profiles" in the *Voyager System Administration User’s Guide*.
Delete records from work files once saved to database	Select this check box to automatically delete a record(s) from your work files, once you save that record to the database.

Table 10-1. General tab options for Session Defaults and Preferences

Options	Description
Delete records from import file once saved to database	Select this check box to automatically delete the record(s) you import from an import file, once you save that record to the database.
Add a subfield ‘a’ to a new field	Select this option to add a subfield ‘a’ automatically to the field when a new field is added to a record using the **Insert field before** (**F3**) and **Insert field after** (**F4**) commands.
Display MARC VIews maximized	Select this option to open a record in its maximized form automatically. **NOTE:** If this option is selected and you have more than one record open at one time, you only see the top record. The other records open behind the top record. You can use the **Window>Cascade** command to minimize and view all open records. This is important to remember if you select the **Close All** command from the **File** menu.

Validation Tab (Figure 10-2)

Customize the options on the **Validation** tab (see Figure 10-2) to match your preferences using Table 10-2 for a description of each option.

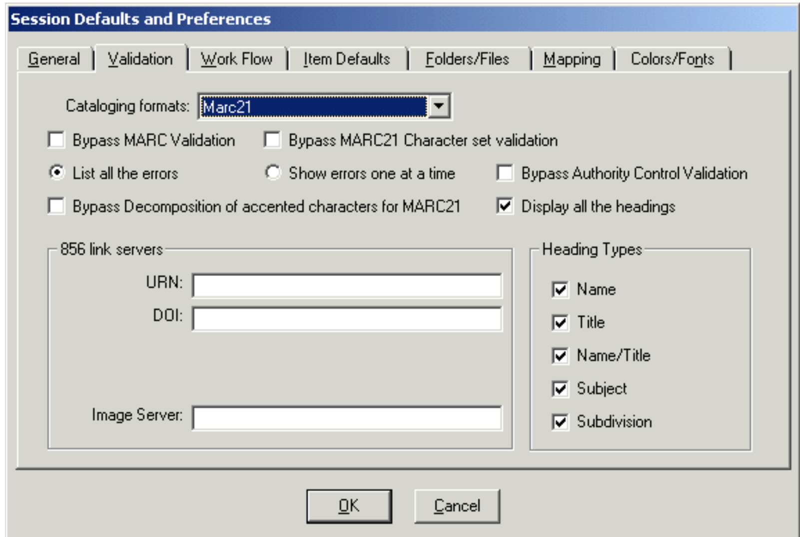

Figure 10-2. Session Defaults: Validation tab

Table 10-2. Validation tab options for Session Defaults and Preferences

Options	**Description**
Cataloging formats	Select one of the Cataloging formats. • Marc21 • Oclc • Rlin See Tag Tables and MARC Validation on page A-4 for more information.
Bypass MARC Validation	Select this option to stop the validation of records against the MARC tag tables when you save to the database. More information regarding tag tables is available in MARC Tag Tables on page A-1. See Figure 10-3 for an example of the message window that displays when this option is not selected and invalid characters are found when attempting to store a record in the database.

Table 10-2. Validation tab options for Session Defaults and Preferences

Options	Description
Bypass MARC21 Character set validation	Select this option to prevent the validation of records against the MARC21 character set when you save to the database. When this option is not selected, the MARC21 Repertoire.cfg file stored in the Catalog folder of the Voyager software on each PC is used for character set validation.
List all the errors	Select this option to display a list of all the errors resulting from the MARC validation. This option is used in combination with **Bypass MARC Validation**.
Show errors one at a time	Select this option to display each error individually that results from the MARC validation. This option is used in combination with **Bypass MARC Validation**.
Bypass Authority Control Validation	Selected this option to stop the validation of records against the authority records when you save to the database. When this option is not selected, only the heading types selected in the **Heading Types** group box undergo authority validation.
Bypass Decomposition of accented characters for MARC21	Select this option to prevent the decomposition of characters for MARC21. Leave this option unchecked for MARC21 compliance. Some non-Voyager data entry methods may utilize composed characters, characters that store two component parts (diacritic and alphabetic character) as a single character with its own unique internal value such as when using a non-U.S. keyboard. For MARC21 compliance, characters with diacritics must be stored as two separate component pieces. (See Diacritics and MARC21 Compliance Considerations on page C-3 for more information.) This feature addresses this issue.
Display all the headings	Select this option to have any of the heading types display in the **Authority Validation** dialog box along with the validated headings. Only the headings in error display when this option is not selected.
Heading Type Name	Select this option to have **Name** heading types validated.
Heading TypesTitle	Select this option to have **Title** heading types validated.
Heading Types Name/ Title	Select this option to have **Name/Title** heading types validated.
Heading Types Subject	Select this option to have **Subject** heading types validated.

Table 10-2. Validation tab options for Session Defaults and Preferences

Options	Description
Heading Types Subdivisionl	Select this option to have **Subdivision** heading types validated. **Subdivision** can only be selected if **Subject** is selected.
856 link servers URN	You can specify the locations of the various servers that are activated by an **856** link in the **856 link servers** dialog box. You can specify the location of the URN, the DOI, and Image Server. URN (Uniform Resource Name) and DOI (Digital Object Identifier) work different than URL addresses (Uniform Resource Locator) in that the URN or DOI identification in the **856** field of the MARC record does not point directly to the digital item. Rather, the URN or DOI identification is first routed through a handler server which then maps the URN or DOI to the physical location of the digital item. You must specify the URL addresses of your URN and DOI handler servers in the **URN** and **DOI** fields on the **Validation** tab of the Session Defaults and Preferences window. When you verify the integrity of a URN or DOI link by selecting **Verify 856 links...** from the **Record** menu (see Verifying 856 Links on page 2-22), the URN or DOI identification in the **856** field will be appended to the address of the URN or DOI handler server. Furthermore, when you follow the verification link to the handler server, you will discover whether or not the URN or DOI entered in the **856** field is valid. For information about entering URN or DOI links in the **856** field of a MARC record, see ‡g DOI and URN Links on page 2-22. For information about Verifying **856** links, see Verifying 856 Links on page 2-22. Also, for information about what needs to be set up for URN or DOI links to be successful in OPAC and WebVoyage, see the *Voyager WebVoyáge User's Guide*.
856 link servers DOI	See description for **856 link servers URN**.
856 link servers Image Server	The **Image Server** field designates which viewer to use to bring up an Image Server link. You may specify the location of the Voyager Image Server executable (the full path must be given such as `c:\symtrix\iadms.exe`), or the location of a browser interface program (such as `http://`*`XXX`*`/cgi-bin/scandoc.cgi`, where *XXX* is the machine on which the program is located). scandoc.cgi is the interface which, when used with ImageServer, uses a browser instead of Scandoc to view the images. The default value for this field is blank.

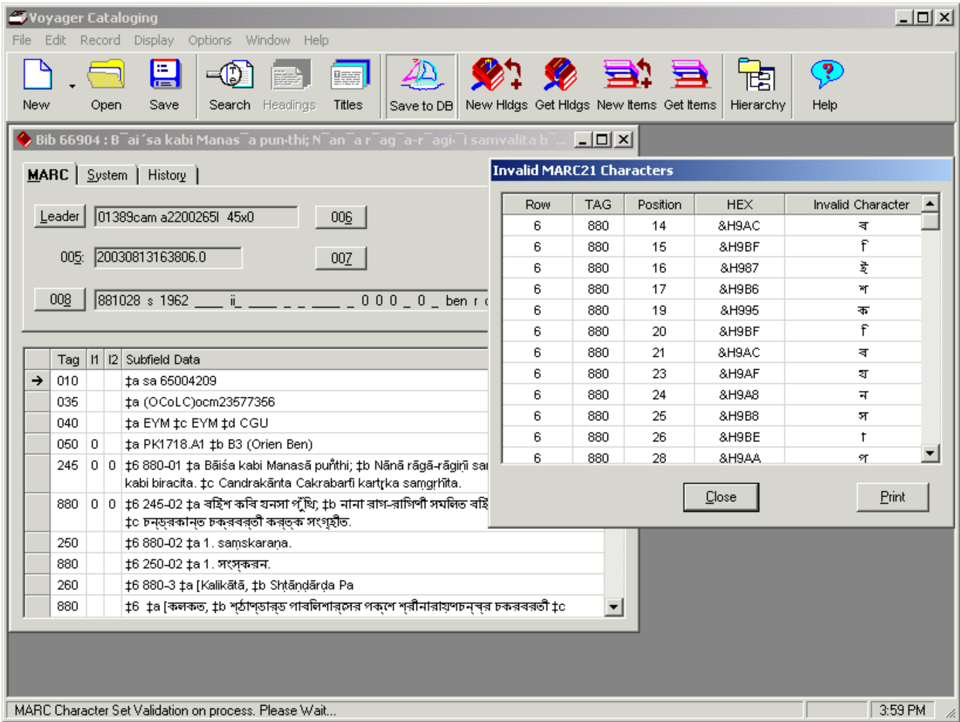

Figure 10-3. Invalid MARC21 Characters message when storing record

Work Flow Tab (Figure 10-4)

Customize the options on the **Work Flow** tab (see Figure 10-4) to match your preferences using Table 10-3 for a description of each option.

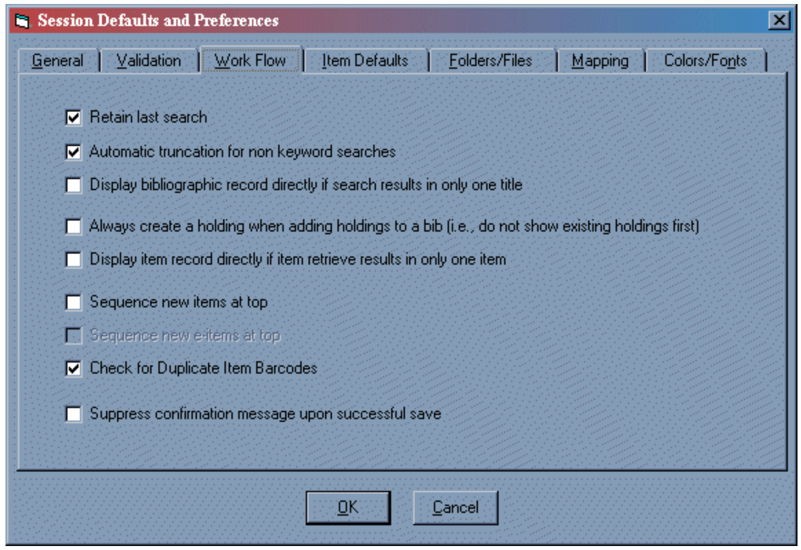

Figure 10-4. Session Defaults: Work Flow tab

Table 10-3. Work Flow tab options for Session Defaults and Preferences

Options	Description
Retain last search	Select this check box to save the last search performed in the **Search** dialog box.
Automatic truncation for non keyword searches	Select this check box to automatically truncate non-keyword searches (such as Headings searches) without requiring the question mark (`?`) as a truncation character.
Display bibliographic record directly if search results in only one title	Select this check box to automatically display a bibliographic record if only one record is available as a result of the search.
Always create a holding when adding holdings to a bib (that is, do not show existing holdings first)	Select this option to be placed in Add mode automatically when a bibliographic record already has holdings and a new one is to be added either by clicking the **New Hldgs** button on the menu bar or selecting **Record>Create Holdings**.
Display item record directly if item retrieve results in only one item	Select this check box to automatically display an item record directly when only one record is available as a result of your search.

Table 10-3. Work Flow tab options for Session Defaults and Preferences

Options	Description
Sequence new items at top	Use this option when creating a new item record to tell the server to add the new item at the top of the sequence instead of the bottom of the sequence.
Sequence new e-items at top	Use this option when creating a new e-item record to tell the server to add the new e-item at the top of the sequence instead of the bottom of the sequence.
Check for Duplicate Item Barcodes	Use this option to specify that when the user adds an item record or a barcode to an existing item the software checks if the barcode is already used in other items. If so, the user receives a warning and has the option to cancel the add item or the add barcode operation, or to save it anyway. If this is unchecked, the software does not check for the presence of duplicate barcodes.
Suppress confirmation message upon successful save	Select this check box to suppress the confirmation message that displays after a record has been successfully saved to the database.

Item Defaults Tab (Figure 10-5)

Customize the options on the **Item Defaults** tab (see Figure 10-5) to match your preferences using Table 10-4 for a description of each option. These default settings affect what is displayed when creating item records. The initial item type default is determined by the default settings (see Cataloging - Policy Definitions in the *Voyager System Administration User's Guide*) for the Cataloging location selected when you log in.

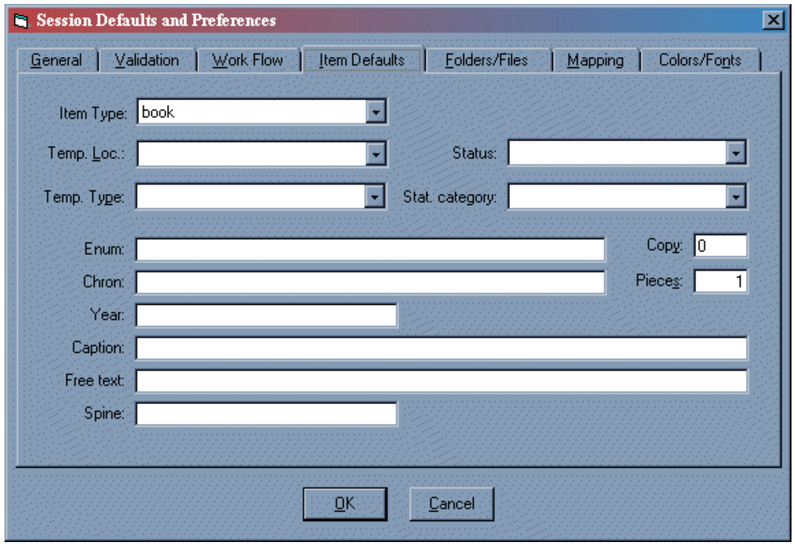

Figure 10-5. Session Defaults: Item Defaults tab

Table 10-4. Item Defaults tab options for Session Defaults and Preferences

Options	Description
Item Type	Select the default **Item Type** to display when creating item records. This defaults to the selection made in Cataloging - Policy Definitions in Voyager System Administration for the location you selected when logging in to the Cataloging module. This is a required field.
Temp. Loc.	Select the default **Temp. Loc.** to display when creating item records.
Temp. Type	Select the default **Temp. Type** to display when creating item records.
Status	Select the default **Status** to display when creating item records.
Stat. category	Select the default **Stat. Category** to display when creating item records.
Enum	Enter the default **Enum** to display when creating item records.
Chron	Enter the default **Chron** to display when creating item records.
Year	Enter the default **Year** to display when creating item records.

Table 10-4. Item Defaults tab options for Session Defaults and Preferences

Options	Description
Caption	Enter the default **Caption** to display when creating item records.
Free text	Enter the default **Free text** to display when creating item records.
Spine	Enter the default **Spine** information to display when creating item records.
Copy	Enter the default **Copy** number to display when creating item records.
Pieces	Enter the default **Pieces** number to display when creating item records.

Folders/Files Tab (Figure 10-6)

Customize the options on the **Folders/Files** tab (see Figure 10-6) to match your preferences using Table 10-5 for a description of each option.

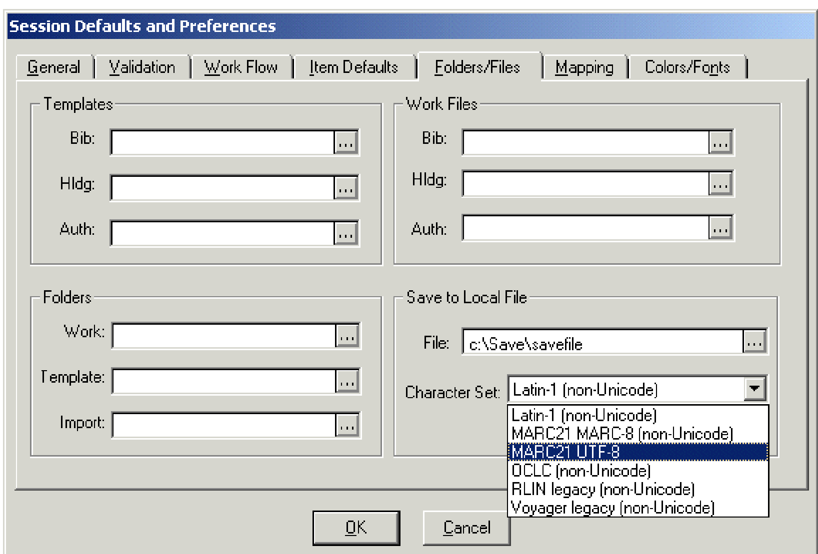

Figure 10-6. Session Defaults: Folders/Files tab

Table 10-5. Folders/Files tab options for Session Defaults and Preferences

Options	Description
Templates • Bib • Hldg • Auth	In the **Templates** block, you can enter a template name (with or without an extension) in the appropriate box (**Bibliographic**, **Authority**, **Holdings**). Voyager looks for that template in the correct working directory when you choose to create a new record. You can also enter the entire path for the appropriate template, or click the ellipses to select the template you want from the appropriate directory. The filename may have any extension. However if the file selected is not the required type of template, Voyager displays an error message. The filename must refer to an existing file. **NOTE:** A file path can only be specified in the **Templates** block if there is one template (as opposed to multiple templates) defined for each record type.
Folders • Work • Template • Import	In the **Folders** block, you can enter or select a default folder so that when you open a work record and/or template and import a record, the **Open** dialog box defaults to the specified folder.
Work Files • Bib • Hldg • Auth	In the **Work Files** block, you can enter the names of the files to which you want your records automatically saved when you use the **Save** or **Save As** feature. If you enter a filename in a field, you will not be prompted for a filename when saving records of that type. You can specify a different file for bibliographic, holdings and item records. If you enter a filename, a record will be automatically saved to this file instead of prompting you for a filename. If the file does not exist it will be created the first time Cataloging attempts to save to the file.

Table 10-5. Folders/Files tab options for Session Defaults and Preferences

Options	Description
Save to Local File • File • Character Set	In the **Save to Local File** block, you can specify the file to which you want bibliographic records to be saved when you use the **Save to Database and to Local File** option (with or without **Close**). Enter the filename in the **File** field or click the ellipses to search for the file to which you want to save. Click the **Character Set drop-down arrow** to select the character set format in which you want the records to be saved. **NOTE:** If no filename is entered into the **File** field, the **Save to Database and to Local File** option is disabled. If the file is specified but does not currently exist, it is created at the next **Save to Database and Local File**.

Mapping Tab (Figure 10-7)

Customize the options on the **Mapping** tab (see Figure 10-7) to match your preferences using Table 10-6 for a description of each option.

Voyager Cataloging allows you to import records from other formats. Use the Mapping tab to identify the format of the records being imported (locally or remotely).

Saving records to the database affects validation and separate tag tables are available to save to based on the record format type you choose. See MARC Tag Tables on page A-1 for more information.

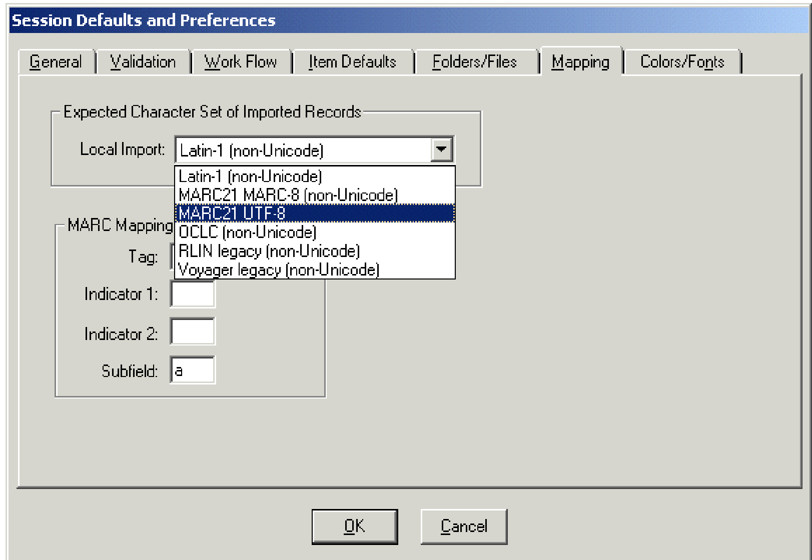

Figure 10-7. Session Defaults: Mapping tab

Table 10-6. Mapping tab options for Session Defaults and Preferences

Options	**Description**
Expected Character Set of Imported Records Local Import	Use the Local Import drop-down menu to select the character set of the records being imported locally. Your choices include the following. • Latin-1 (non-Unicode) • MARC21 MARC-8 (non-Unicode) • MARC21 UTF-8 • OCLC (non-Unicode) • RLIN legacy (non-Unicode) • Voyager legacy (non-Unicode) This provides the information needed by the system to map the incoming records to Unicode UTF-8 encoding.

Table 10-6. **Mapping tab options for Session Defaults and Preferences**

Options	Description
MARC Mapping for OCR Data Tag Indicator 1 Indicator 2 Subfield	This feature is used specifically in conjunction with Image Server. This feature applies to the sending of Full-Text OCR data (text read from a non-searchable image stored in Image Server) from the Image Server program to an active bibliographic record in Cataloging. Once the OCR data is inserted into an active bibliographic record, the data is then searchable through Voyager. Specify the Tag, Indicator 1, Indicator 2 and Subfield where OCR data should be inserted into an active bibliographic record. If you do not specify this information, the following defaults will be used: Tag: 500, Indicator 1: none, Indicator 2: none, Subfield: a. **NOTE:** A maximum of 1600 characters will fit into a single field of a MARC record. Each time a field reaches this limit, another identical field will be created into which the rest of the data will be inserted. In addition, it should be noted that the maximum record size for a MARC record in Voyager is 64K.

Colors/Fonts Tab (Figure 10-8)

You can change the background color and the text color for your records. You can define the colors displayed for the following records.

- MARC Views (variable fields)
- Record Hierarchy
- Global Headings Change Hierarchy

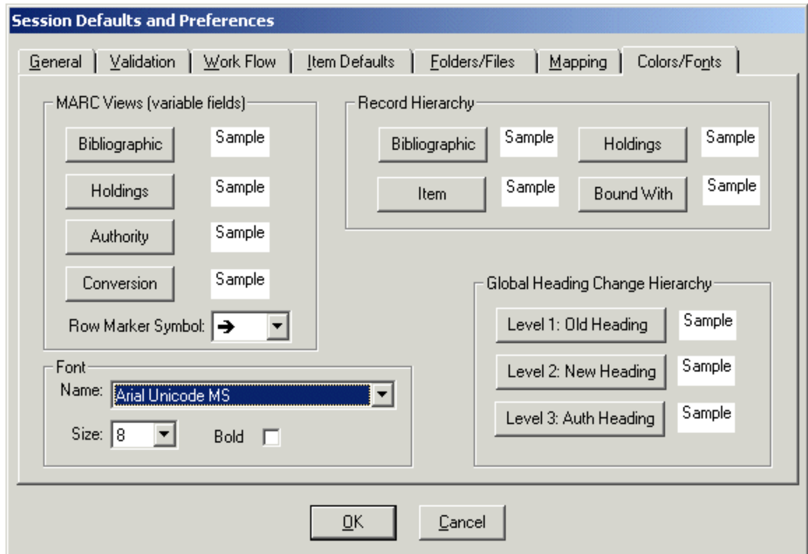

Figure 10-8. Session Defaults: Colors/Font tab

The procedure for changing colors and fonts is shown in Procedure 10-1, Changing Colors and Fonts, on page 10-17.

Procedure 10-1. Changing Colors and Fonts

Use the following to change colors and fonts.

1. Click the button for the type of record to which you want to change the color.

   Your choices are the following (see Table 10-7).

Table 10-7. Record types available for color change

Color/Fonts Tab Dialog Box Group	Record Type
MARC views (variable fields)	• Bibliographic • Holdings • Authority • Conversion

Table 10-7. **Record types available for color change**

Color/Fonts Tab Dialog Box Group	Record Type
Record Hierarchy	• Bibliographic • Holdings • Item • Bound With
Global Heading Change Hierarchy	• Level 1: Old Heading • Level 2: New Heading • Level 3: Auth Heading

Result: A menu of options displays.

TIP:
Change the Conversion colors to highlight records that display in Cataloging but were not converted. (These are the same records that are identified by nc in the Title Bar. See *Non-Converted Records (nc) on page C-4* *for more information.)*

2. Select **Text Color**, **Back color**, or **Reset Color** depending on the color you want to change.

   Result: The **Color** dialog box opens.

3. Select a color and click **OK**.

   Result: The color is displayed in the **Sample** box.

NOTE:
To reset the colors for one type of record to the default, click the record type button and select **Reset Color** from the submenu.

4. Click the drop-down arrow for **Row Marker Symbol** to select the type of indicator used to identify the current row in MARC records.

   Result: This sets the row marker symbol to your preference.

5. Click the drop-down arrow for font **Name** to select the font to be used.

Result: This changes the font to the one you prefer.

TIP:
The Lucida Sans Unicode (or if you have Microsoft Office fonts installed, Arial Unicode MS) font provides a broad spectrum of characters for the Unicode environment.

6. Click the drop-down arrow for **Font Size** to select the font size.

   Result: This changes the font size to the one you prefer.

7. Check the **Font Bold** check box to specify that the text displayed in the Variable Fields is bold.

   Result: This changes the font weight preference to bold.

Cataloging Menus

Voyager's Cataloging module provides you with the ability to create, update, and save MARC 21 records.

NOTE:
Some of the menus only display after you create or open a record, or highlight text in an open record.

File Menu

The contents of the **File** menu are shown in Table 10-8.

Table 10-8. File Menu

Option	Description
Work Record	Displays options for opening and deleting existing records.
Template	Displays options for creating, editing, and deleting templates.
Login Info	Displays your user name and operator ID.
Save Ctrl+S	Saves the active record to the location from which it was opened.

Table 10-8. File Menu

Option	Description
Save As... Ctrl+A	Saves the active record in a new location (such as a work file).
Close	Closes the active record.
Close All	Closes all of the active records.
Print Setup	Displays the Print dialog box.
Print Record Ctrl+P	Prints an active record.
Print Label	Displays the Print Labels dialog box.
Global Headings Change... Ctrl+G	Displays the Global Headings Change Queue.
Pick and Scan Ctrl+I	Facilitates mass changes (change, delete, or clear data) to item records and associated holdings records by authorized staff.
Exit	Exits the Cataloging module.

Edit Menu

The contents of the **Edit** menu are shown in Table 10-9.

Table 10-9. Edit Menu

Option	Description
Cut Ctrl-x	Cuts the highlighted text and places it on the clipboard.
Copy Ctrl-c	Copies the highlighted text and places it on the clipboard.

Table 10-9. Edit Menu

Option	Description
Paste Ctrl-v	Inserts the text stored on the clipboard and pastes the rows above the target row. All of the MARC view records contain a dummy row that displays at the end of the variable fields. The purpose of the dummy row is to allow you to paste into the last editable row since the action of paste will insert the information before the marked row. You can not do anything to the dummy row except copy above it. You can paste the information (that is, entire rows) that you have copied from an open or closed row. Selecting multiple rows are achieved by holding down the Ctrl key and clicking the rows. **NOTE:** If you cut and paste information from a different application such as Microsoft Word, some characters are stripped out.
Insert Field Before (F3)	Adds a blank MARC field before the active field.
Insert Field After (F4)	Adds a blank MARC field after the active field.
Delete Field Del	Deletes the active MARC field. This field or subfield cannot then be pasted elsewhere.
Unselect Text F11	Unselects the currently selected text.
Insert Subfield (F9)	Adds a blank MARC subfield (with delimiter).
Diacritic Entry Ctrl + e	Displays the Diacritic Entry dialog box and allows you to choose a diacritic character for entering in your record.
Diacritic Mode Ctrl + d	Allows you to change your keyboard to diacritic mode.
Show Marc Values F2	Displays a selection table with all valid MARC values for the active field or subfield.
Show Holdings Locations Ctrl-L	Displays all available holdings locations and abbreviations for your security access level.
Insert URL from Browser Ctrl+U	Creates a new 856 field containing the URL of the page currently displayed in your Web browser.

Record Menu

The contents of the **Record** menu is shown in Table 10-10.

Table 10-10. Record Menu

Option	Description
New	Creates a new record.
Search	Searches for a record in the database.
Make a Copy	Copies the active record. It must have been retrieved from the database.
Change Owning Library	Changes the owning library of the current bibliographic record.
Retrieve by ID	Retrieves the record by an ID number.
Retrieve by Barcode	Retrieves a record by its barcode number.
Unlink Holdings from Bib	Unlinks a holdings record from multiple bibliographic records.
Relink Holdings to Bib	Re-links the current item record to a different holdings record
Show Associated Records	Displays holding, bibliographic and item records associated with the active record.
Retrieve Holdings	Retrieves the holdings records for the active record.
Create Holdings	Creates a new holdings record for the active record.
Retrieve Item	Retrieves the item records for the active holdings record.
Create Items	Creates a new item record for the active holdings record.
Retrieve Authorities	Retrieves the authority records for the active record.
View Line Items in Acquisitions Ctrl+M	Allows you to automatically pull up and edit a line item in the Acquisitions module from an open bibliographic or holdings record in the Cataloging module. Both the Cataloging and Acquisitions modules must be open and logged into with the same user ID and password.

Table 10-10. Record Menu

Option	Description
Get Call Number from Bib Record Ctrl+N	Causes a bibliographic record call number to be automatically inserted into the 852h and 852i fields of a holdings record. You do not need to have the bibliographic record to which the holdings record is associated open; only the holdings record.
Verify 856 links Ctrl+K	Verifies 856 links in the active record.
Validate heading	Validates the current heading.
Save to Database Ctrl+B	Saves the active record to the database.
Save to Database and Close Ctrl+Z	Save the active record to the database and then closes the record.
Delete	Deletes the active record.
Import	Imports records into Voyager Cataloging.
History	Displays information about an item record.

Item Menu

The contents of the **Item** menu are shown in Table 10-11. This menu is only available when an item record is the active record.

Table 10-11. Item Menu

Option	Description
View Status Ctrl + S	Displays status information that can be assigned to items.
View Statistics Ctrl + T	Displays statistical information that can be assigned to items.
View Notes Ctrl + N	Displays any notes associated with the item record.
View Barcodes Ctrl + A	Displays the Barcodes dialog box for adding or deleting barcodes from an item record.

Display Menu

The contents of the **Display** menu is shown in Table 10-12.

Table 10-12. Display Menu

Option	Description
Headings List	Displays the list of headings found in the most recent search.
Title Index	Displays the list of titles found in the most recent search.

Options Menu

The contents of the **Options** menu is shown in Table 10-13.

Table 10-13. Options Menu

Option	Description
Session Defaults	Displays the options you can set for your session, including authority control options.
Hide Fixed Fields	Hides the fixed fields of your records, so you can see more of the variable fields.
Toolbar	Toggles the display of the Toolbar on and off.
Toolbar Text	This toggles descriptive text that displays under a particular icon on the Toolbar on and off.
Toolbar Tips	This toggles the tips that display when you hover over a particular icon on the Toolbar on and off.
Status Bar	Toggles the display of the Status Bar on and off.

Window Menu

The contents of the **Window** menu is shown in Table 10-14.

Table 10-14. Window Menu

Option	Description
Cascade	Arranges multiple windows so they overlap.
Tile	Arranges multiple windows so they do not overlap.

Table 10-14. Window Menu

Option	Description
Arrange Icons	Arranges icons for minimized windows at the bottom of the main window.
Window 1, 2...	Lists currently open document windows. A check mark displays in front of the active document window. Select one to make that record active.The long number is the record ID.

Help Menu

The contents of the **Help** menu is shown in Table 10-15.

Table 10-15.

Option	Description
Help Topics	Displays a list of Cataloging help topics.
Endeavor on the Web	Allows you to connect to the Endeavor Home Page or to Endeavor Support Web.
About Cataloging	Displays the copyright notice and version number of your copy of Voyager Cataloging.

MARC Tag Tables

A

Introduction

The MARC tag tables define various types of records, fields, and subfields for bibliographic and authority records. The tag tables are located in the `\Voyager\Catalog\Tagtable` directory on the client PC. See Figure A-1. Tag tables are configuration files identified by the `.cfg` file extension.

The tag table configuration files can be modified to match your requirements. They can be edited using a program such as Notepad which is provided with the Windows operating system.

NOTE:
Configuration files can be saved and edited using any word processor. However, they must be saved in ASCII format. ASCII format supports alphabetic, numeric, and special characters represented by a 7-bit binary number for up to 128 possible characters.

When you open the `\Voyager\Catalog\Tagtable` directory, you will see the following structure.

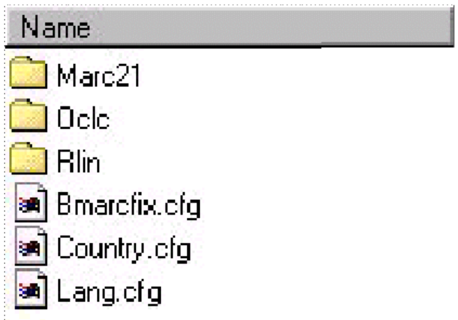

Figure A-1. Files and directories in the Voyager/Catalog/Tagtable directory

The `OCLC`, `RLIN`, and `MARC21` folders in the directory contain specific sets of tag tables used solely in the Cataloging module. These tag tables are used for MARC validation. If you open these directories, you see a long list of files as in Figure A-2.

The `Bmarcfix.cfg`, `Country.cfg`, and `Lang.cfg` files are tag tables that are used across modules. These files contain data that is used in the Circulation and Acquisitions modules for country and language codes.

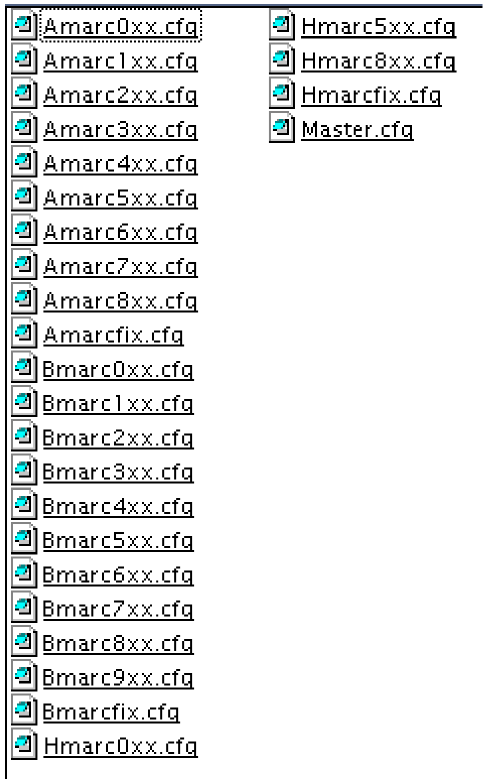

Figure A-2. Various configuration files/tag tables in the MARC21 directory

In the `OCLC`, `RLIN`, and `MARC21` directories, all the files that begin with the letter `A` pertain to authority records, all the files that begin with the letter `B` pertain to bibliographic records, and all the files that begin with the letter `H` pertain to holdings records. After the letters `A`, `B`, or `H`, each of the filenames includes the word `marc` followed by a number and an `xx`. The number and `xx` indicate the field range to which the file pertains. For example, `Amarc3xx.cfg` pertains to authority record fields in the 300 range, and `Hmarc2xx.cfg` pertains to holdings record fields in the 200 range.

Filenames that do not include a number but include the word fix pertain to the fixed fields including **Leader** fields for the particular record type. For example, `Bmarcfix.cfg` pertains to bibliographic record fixed fields.

In the `OCLC`, `RLIN`, and `MARC21` directories there is a file called `master.cfg`. This file provides a high-level outline of the fields included in authority, bibliographic, and holdings records for each one’s tag table format.

NOTE:
When modifications are made to a specific configuration file, it may also be necessary to make a corresponding change in the `master.cfg` file in that folder.

Tag Tables and MARC Validation

The tag tables are used in the Cataloging module to validate your MARC records as they are saved to the database. The main configuration file, `master.cfg`, can be edited to include or exclude authority, bibliographic, holdings, or local files in the MARC validation process. Certain fields can also be identified as mandatory validation checks for compliance with the OCLC, RLIN, and MARC21 formats.

The Cataloging module validates MARC records against one of three different tag tables formats, OCLC, RLIN, or MARC21. These three formats display as options in **Session Defaults and Preferences** Cataloging formats. See Figure A-3. If you do not want one or more of these formats available as MARC validation choices, you can delete the directory from `\Voyager\Catalog\Tagtable` and the Cataloging module does not display them as options.

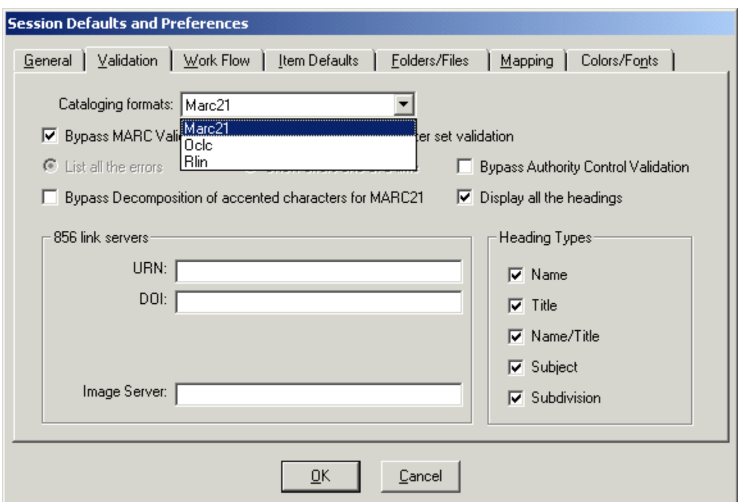

Figure A-3. Cataloging format choices for MARC validation

If you save a record to the database in Cataloging with MARC validation turned on and an inconsistency or error is found against the tag tables, you receive an error report. See Figure A-4. This alerts you to the inconsistency or error discovered so that you can make the necessary changes to the record. If you do not make the changes necessary to validate the record against the tag tables, you are not able to save the record to the database.

NOTE:
MARC validation can be bypassed if you check the **Bypass MARC Validation** or **Bypass MARC21 Character set validation** check box on the **Validation** tab of **Session Defaults and Preferences**.

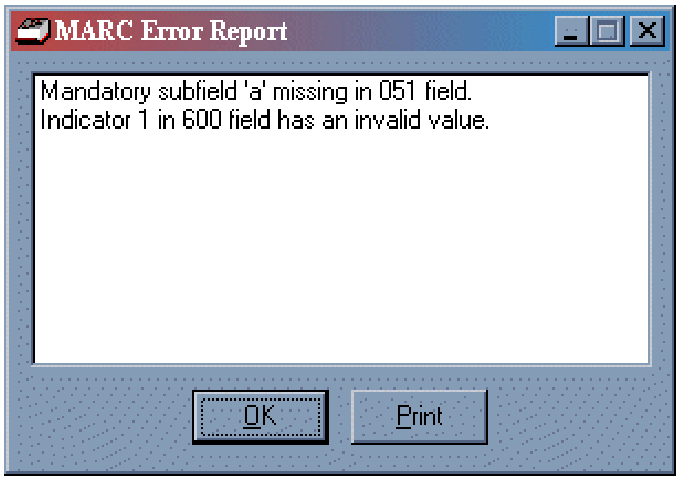

Figure A-4. Sample report if MARC validation finds an error while saving a record to the database

Structure of MARC Tag Tables Overview

All the MARC tag tables contain similar structural components. For the most part, they all begin with comments (see Figure A-5) and subsequently, stanzas (see Stanzas in the MARC Tag Tables on page A-6) outlining fields and/or their contents and values.

TIP:
In order to keep track of the updates you make to the tag tables, record your additions, edits, and/or deletions at the beginning of each configuration file in the comment area. In the Table A-5 example, notice that the initials of the tag table editor are included to keep track of who performed the modifications.

```
# comment your work! EJW
# comment starting date 7/22/97 EJW
# sorted authority, bib, & Mfhd sections 7/22/97 EJW
# added bib 261 and 262 8/11/97 /ES
# deleted bib 211, 212, 214, 350, 503, 539, 590-599 /8/11/97 /
        ES
# added 856 to holdings 1/6/98 EJW
# added authority fields for subdivision records 2/24/98 EJW
# changed RecFormat code im description 3/10/98 HB
# changed RecFormat of im = Audio to im = Music   5/21/98 ES
# update # 3 8/13/98 KLD
# added 'u' as a Holding value in RecFormat  5/4/99 ES
```

Figure A-5. Sample comment area of a tag table

Stanzas in the MARC Tag Tables

MARC tag tables are divided into sections called stanzas. Stanzas are generally located after the comment area at the beginning of a configuration file.

Stanza Names

Each stanza begins with a name or a title enclosed in square brackets such as `[410]`. The stanza name is unique within each configuration file.

Stanzas are the main component of the tag tables. They define contents and values on both a high and a low level for each tag table format. For example in the `Bmarcfix.cfg` file of the RLIN directory, the `[490]` stanza provides details about the **490** field of bibliographic records including valid subfields and their values.

Stanzas That Reference Other Stanzas

Stanzas in the tag tables can also reference other stanzas, ones that provide more detail about particular fields, subfields, or templates. For example in the `Bmarcfix.cfg` file of the MARC21 directory, the `[007Code]` stanza defines the possible values for the **007** fixed field of bibliographic records. This stanza includes the templates used for each possible value such as subfield a for Maps uses the 007_Map template. Since the `[007Code]` stanza references the

007_Maps template and that template is not defined in the `[007Code]` stanza, there must be another stanza in the `Bmarcfix.cfg` file called `[007_Map]`. This stanza provides the details about that particular template type.

NOTE:
Stanzas that are referenced by other stanzas can be located either directly after the stanza that references them or all together at the end of a configuration file.

Stanza Components

In Figure A-6, there are three sample stanzas taken from the `Hmarx0xx.cfg` file of the MARC21 tag table format. These stanzas outline the **014** linkage number field of holdings records.

```
[014]
0=a 0A
1=b 0A
2=z 1A
3=9 0A
Subfa=Linkage number
Subfb=Source of number
Subfz=Cancelled/invalid linkage number
Subf9=Old holdings linkage number

[014Ind1]
0=0
1=1
Value0=Holdings record number
Value1=Bibliographic record number

[014Ind2]
0=_
Value_=Undefined
```

Figure A-6. Sample stanzas from the Hmarc0xx.cfg file for MARC21 format

MARC tag field/ indicator field

This is the name of the stanza. In Figure A-6, this is `[014]`, `[014Ind1]`, and `[014Ind2]`.

MARC subfield

In Figure A-6, there are four subfields defined as `a`, `b`, `z`, and `9`.

Software order number

These numbers are only used by the software itself and are insignificant to the actual user. In Figure A-6, there are four software order numbers 0, 1, 2, and 3.

Subfield rule definition

The value `0` or `1` indicates if the field is repeatable. `0` means it is a non-repeatable field and `1` means it is a repeatable field. In Figure A-6, subfields `a`, `b`, and `9` are non-repeatable fields and subfield `z` is a repeatable field.

Subfield rule definition

The subfield rule value either `A`, `M`, or `O` indicates whether the field is applicable, mandatory, or optional. `A` means the field is applicable, `M` means it is mandatory, and `O` means it is optional. In Figure A-6, all the subfields are applicable with a value of `A`. None are mandatory or optional.

IMPORTANT:
These values are used during MARC validation in the Cataloging module. The system gives particular attention to mandatory subfields, those with a value of M. If it is a mandatory subfield and no value is set for it in the Cataloging module, you get a warning message when you try to save the record indicating that you have left out a mandatory field.

Subfield and subfield definition

The subfield/subfield definition stanza component describes the values that you input to the subfield in the Cataloging module. In the Cataloging module when you press **F2** with your cursor in the appropriate subfield, the values entered in this component display. In Figure A-6, subfield `a` is the linkage number, subfield `b` is the source of number, subfield `z` is the cancelled/invalid linkage number, and subfield `9` is the old holdings linkage number.

Indicator value

Valid indicator values are specified in this component of the stanza. In Figure A-6, the valid values for indicator `1` of the `014` field are `0` and `1` as defined in the second last stanza; and the valid value for indicator `2` of the `014` is `0` as defined in the last stanza.

Indicator and indicator definition

The indicator/indicator definition component specifies the indicator values for the indicators of MARC fields. In Figure A-6, the definition for valid value `0` is holdings record number, and the definition for valid value `1` is bibliographic record number. The definition for valid value `0` is undefined for indicator `2` of the `014` field. In the Cataloging module when you press **F2** and your cursor is in the appropriate indicator field, the values entered in this component display.

Xmarcfix.cfg Tag Tables

There are three `Xmarcfix.cfg` tag tables.

- `Amarcfix.cfg`
- `Bmarcfix.cfg`
- `Hmarcfix.cfg`

These files define the valid values for the fixed fields of authority, bibliographic, and holdings records for each tag table format, OCLC, RLIN, and MARC21.

Sample Xmarcfix.cfg Tag Table

Figure A-7 is an example of one the `Xmarcfix.cfg` tag tables. Specifically, this is an example of a `Bmarcfix.cfg` tag table.

```
[006Code]
a=&Books,                        006_Books
c=P&rinted Music,                006_Music
d=Manuscr&ipt Music,             006_Music
e=Prin&ted Map,                  006_Maps
f=&Manuscript Map,               006_Maps
g=&Projected Medium,             006_Visual
i=&Nonmusical Sound,             006_Music
j=Musical S&ound,                006_Music
k=&2-D Nonprojectable,           006_Visual
m=Computer &File,                006_Computer
o=&Kit,                          006_Visual
p=Mi&xed Material,               006_Mixed
r=&3-D Artifact,                 006_Visual
s=&Serial Control,               006_Serials
t=Manuscript &Lang.,             006_Books
```

Figure A-7. Sample Bmarcfix.cfg file stanza from the new MARC tag tables

CAUTION:
One or more spaces must be used after a comma to separate the different components of information specified in the .cfg tag tables. Do not use tabs.

Grid Templates

In tag tables, you can define grid templates as per your preferences. These templates determine how the grid for fixed fields displays in the Cataloging module. See Figure A-9.

The templates used for a specific field/subfield have their own stanzas that can be defined immediately following the stanza that references them or all together at the end of the configuration file. See Figure A-8 for a sample template for subfield **a**.

```
[006_Books]
Illustrations 1,      006/008BooksIllustrations,      1,  1, _
Illustrations 2,      006/008BooksIllustrations,      2,  1, _
Illustrations 3,      006/008BooksIllustrations,      3,  1, _
Illustrations 4,      006/008BooksIllustrations,      4,  1, _
Audience,             006/008BooksAudience,           5,  1, _
Form Of Item,         006/008BooksItem,               6,  1, _
Contents 1,           006/008BooksContents,           7,  1, _
Contents 2,           006/008BooksContents,           8,  1, _
Contents 3,           006/008BooksContents,           9,  1, _
Contents 4,           006/008BooksContents,           10,  1, _
Govt. Publications,   006/008BooksGovtPub,            11,  1, _
Conf. Publications,   006/008BooksConfPub,            12,  1, 0
Festschrift,          006/008BooksFestschrift,        13,  1, 0
Index,                006/008BooksIndex,              14,  1, 1
Literary Form,        006/008BooksLiteraryForm,       16,  1, 0
Biography,            006/008BooksBiography,          17,  1, _
```

Figure A-8. Sample 006_Books stanza in a Bmarcfix.cfg file

In the Cataloging module, the template in Figure A-8 displays the grid as illustrated in Figure A-9 for the **006** fixed field of bibliographic records.

The procedure for accessing the 006 field grid is shown in Procedure A-1, Accessing the 006 Field Grid, on page A-11.

Procedure A-1. Accessing the 006 Field Grid

Use the following to access the **006** field grid.

1. Click the **006** button on the **MARC** tab.

2. Click the **New** button.

Result: The **Additional Materials Characteristics** dialog box opens. See Figure A-9.

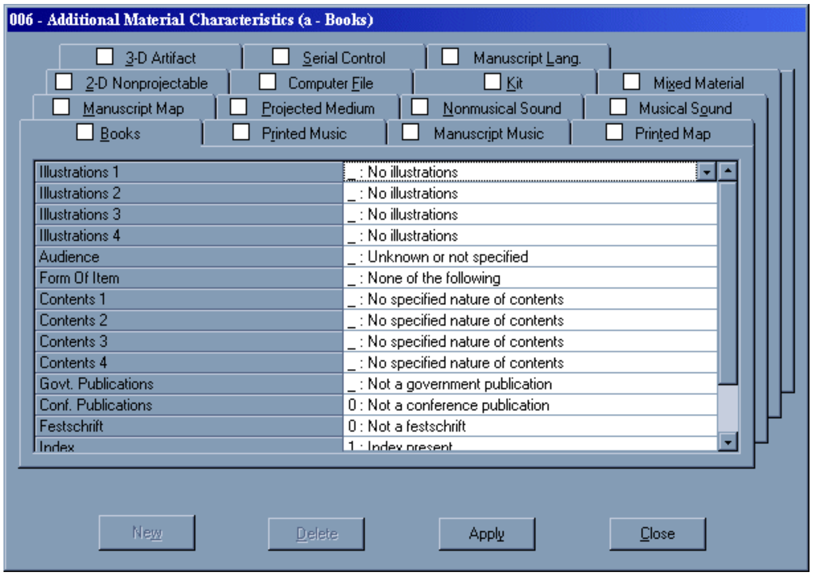

Figure A-9. Grid for the 006 field of a bibliographic record

Defining Your Own Keyboard Shortcuts

In the stanzas of the new tag tables, you are able to specify keyboard access keys/shortcuts for each tab of the fixed field grid templates. This allows you to use a keyboard shortcut as opposed to the mouse to access a certain tab.

You define a keyboard shortcut via the ampersand (&) symbol in the stanzas defining the various tabs of a fixed field grid. See Figure A-7.

The keyboard equivalents employ the **Alt** key plus a letter or number that you designate within the appropriate stanza. The letter you designate as the keyboard equivalent is underlined in the Cataloging module on the corresponding tab.

NOTE:
The & (ampersand) is stripped out of the string when it is displayed in the form title bar.

For instance, instead of accessing the **Books** tab using the mouse, you may want to use the **Alt+b** keystroke. To set this up, you place an & (ampersand) in front of the letter you want to use in combination with the **Alt** key in the appropriate `Xmarcfix.cfg` file such as a=&Books as in Figure A-7. In the Cataloging module using this example, the **Books** tab displays with **B** in **Books** underlined. See Figure A-10.

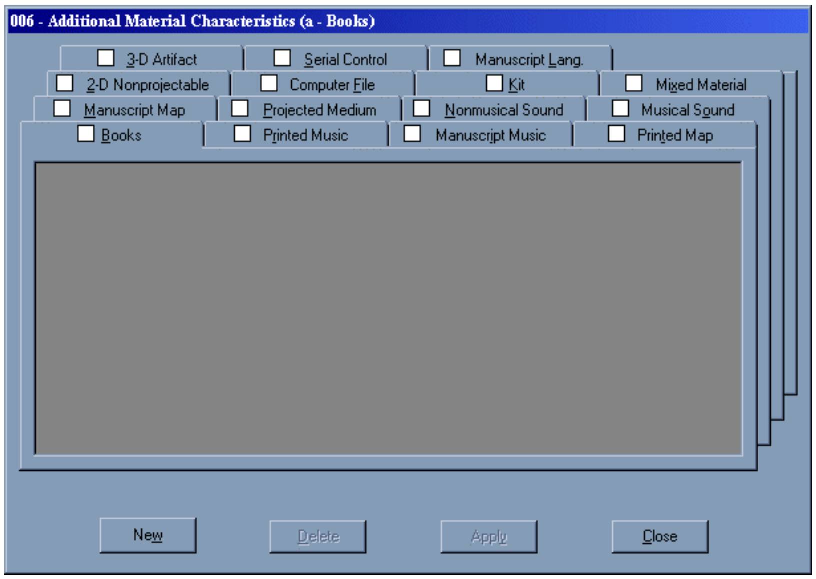

Figure A-10. Sample keyboard shortcut for the Books tab

NOTE:
You can only designate one keyboard equivalent at a time. If you define more than one, only the last one will be used.

Stanzas in the Xmarcfix.cfg Tag Tables

There are three types of stanzas in each of the `Xmarcfix.cfg` tag tables.

- Code type or tab stanzas
- Grid template stanzas
- Drop-down menu selection stanzas

NOTE:
The order and the structure of these stanzas is hierarchical. The code type stanzas define what tabs display for fixed fields in the Cataloging module. The

grid template stanzas define the grid that displays once you select a tab for a fixed field. The drop-down menu stanzas define the selections you have on a particular grid.

Code Type/Tab Stanzas [00xCode]

Code types essentially define what tabs display in the Cataloging module for each fixed field. To access these tabs, you click the **Leader**, **006**, **007**, or **008** buttons from the **MARC** tab of an authority, bibliographic, or holdings record. Remember that holdings records do not have 006 field, and authority records do not have 006 or **007** fields.

For example if you click the **007** button on the **MARC** tab of a bibliographic record, the tab selections as illustrated in Figure A-11 display based on what is defined in the MARC tag tables in the `Bmarcfix.cfg` file.

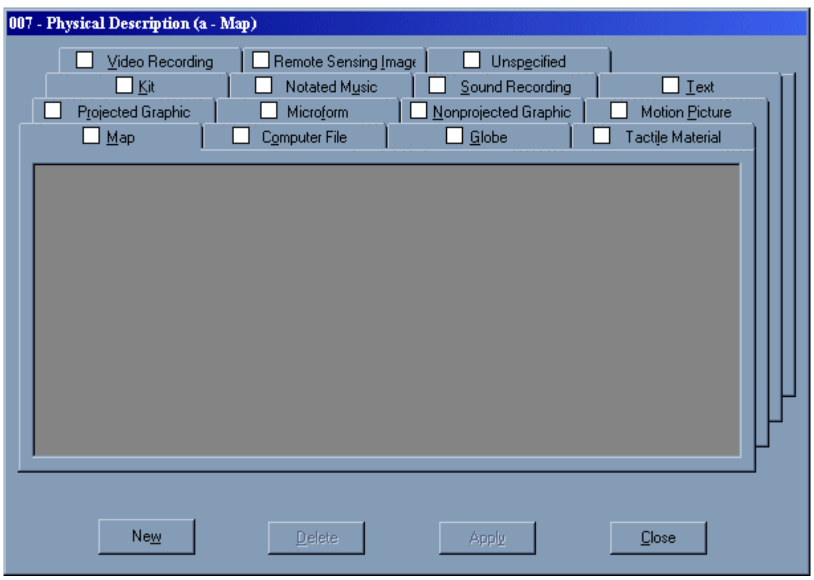

Figure A-11. Code types/tabs that display in the Cataloging module for a bibliographic record

Once you select a tab from the Cataloging module, and click the **New** button, a grid displays with all the possible values for that particular tab/code type.

Types of Code Type/Tab Stanzas

There are four stanzas for code types/tabs for each tag table format.

- `[006Code]`
- `[007Code]`
- `[008Code]`
- `[000Code]`

Each stanza pertains to a particular fixed field. For example, `[000Code]` pertains to the **Leader** field.

IMPORTANT:
Do not change the names of the four code type/tab stanzas `[000Code]`*,* `[006Code]`*,* `[007Code]`*, and* `[008Code]`*. These stanza headings are used by the program to look for the tab data for their respective 00x type. Altering these stanza names or adding additional stanzas with these names will cause unpredictable results.*

The `[00xCode]` stanzas define the following.

- The name of the tabs that display in the Cataloging module for each record type.
- The order of the tabs that display in the Cataloging module for each record type.
- The template used for each tab in the Cataloging module for each record type.

Names of Tabs in the Cataloging Module

The `[006Code]`, `[007Code]`, `[008Code]`, and `[000Code]` stanzas of the `Xmarcfix.cfg` tag tables define the names of the tabs that display in the Cataloging module for the fixed fields of each record type. The names of the tabs are listed directly after the stanza name. See Figure A-12. The letter at the beginning of each line is called the code type. This is an industry standard and should not be altered. This value is also used by the program to reference other values in other stanzas.

```
[006Code]
a=&Books,                         006_Books
c=P&rinted Music,                 006_Music
d=Manuscr&ipt Music,              006_Music
e=Prin&ted Map,                   006_Maps
f=&Manuscript Map,                006_Maps
g=&Projected Medium,              006_Visual
i=&Nonmusical Sound,              006_Music
j=Musical S&ound,                 006_Music
k=&2-D Nonprojectable,            006_Visual
m=Computer &File,                 006_Computer
o=&Kit,                           006_Visual
p=Mi&xed Material,                006_Mixed
r=&3-D Artifact,                  006_Visual
s=&Serial Control,                006_Serials
t=Manuscript &Lang.,              006_Books
```

Figure A-12. Code type examples from the [006Code] stanza of a Bmarcfix.cfg file for MARC21 format

The specifications in Figure A-12 display as shown in Figure A-13 when the **006** button on the **MARC** tab of a bibliographic record using MARC21 format in the Cataloging module is selected.

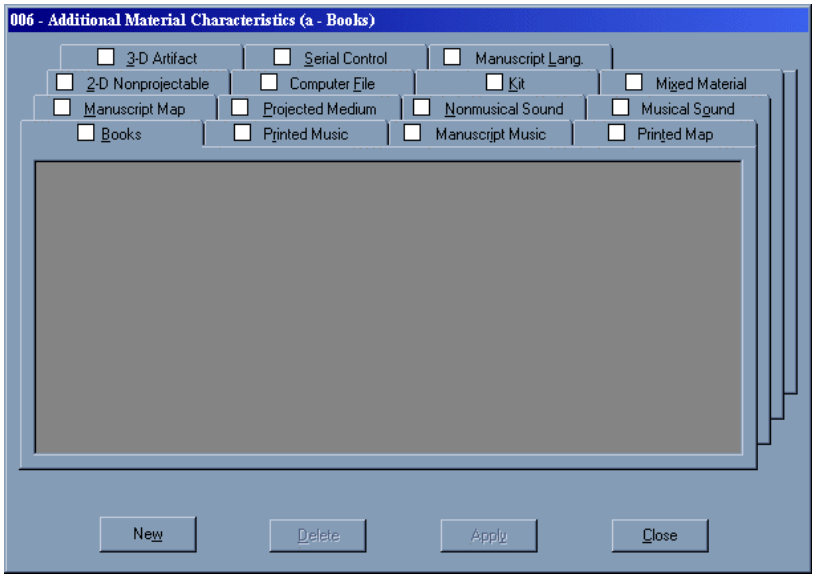

Figure A-13. The result in the Cataloging module of the [006Code] stanza in the Bmarcfix.cfg file

Order of Tabs in the Cataloging Module

The order that the tabs are displayed in the Cataloging module depends on the order of the lines in the `[00xCode]` stanzas of the `Xmarcfix.cfg` files. You can alter the tab layout as per your preferences as long as you cut and paste whole stanza rows.

For example, to display the **Printed Music** tab before the **Books** tab in the bibliographic record 006 grid, change the `[006Code]` stanza in the `Bmarcfix.cfg` file to the order highlighted in Figure A-14.

```
[006Code]
c=P&rinted Music,                006_Music
a=&Books,                        006_Books
...
```

Figure A-14. Arrangement of tabs

Grid Templates in the Cataloging Module

The grid template declaration indicates the template that the program uses for each tab of the fixed fields. These templates are indicated on the far right column of each `[00xCode]` stanza in the `Xmarcfix.cfg` files.

In the example in Figure A-14, the **Printed Music** tab uses a template called 006_Music. Tabs can use either the same template or they can use different templates. The contents and structure of each template is defined in the `[00x_???]` template stanzas. See Template Stanzas [00x_???]for more information.

Template Stanzas [00x_???]

`[00x_???]` stanzas in `Xmarcfix.cfg` files have five columns in which you define the following for each record type.

- The selections you have on the grid for each code type/tab in the Cataloging module.
- Whether the grid includes drop-down menus or text boxes. If drop-down menus are included, this stanza references the name of the drop-down menu stanza in which valid selections are outlined.
- The character position for values in the records, integer values.
- The length of the selection.
- Default values for drop-down menus and masks for text boxes.

IMPORTANT:
Template configuration stanzas must have five comma-delimited entries/ columns per line, or the program will not function properly.

See Figure A-15 for an example of a template configuration stanza from a `Bmarcfix.cfg` file using the MARC21 tag table format.

```
[008_Books]
Publication Status,     008PublicationStatus,
Date 1 (yyyy),          <<<TEXT>>>,                    7, 4, aaaa
Date 2 (yyyy),          <<<TEXT>>>,                    11, 4, aaaa
Place of Publication,   Country,                       15 3, xx_
Illustrations 1,        006/008BooksIllustrations,     18, 1, _
Illustrations 2,        006/008BooksIllustrations,     19, 1,  _
Illustrations 3,        006/008BooksIllustrations,     20, 1, _
Illustrations 4,        006/008BooksIllustrations,     21, 1, _
Audience,               006/008BooksAudience,          22, 1, _
Form of Item,           006/008BooksItem,              23, 1, _
Contents 1,             006/008BooksContents,          24, 1, _
Contents 2,             006/008BooksContents,          25, 1, _
Contents 3,             006/008BooksContents,          26, 1, _
Contents 4,             006/008BooksContents,          27, 1, _
Govt. Publication,      006/008BooksGovtPub,           28, 1, _
Conf. Publication,      006/008BooksConfPub,           29, 1, _
Festschrift,            006/008BooksFestschrift,       30, 1, 0
Index,                  006/008BooksIndex,             31, 1, 0
Literary Form,          006/008BooksLiteraryForm,      33, 1, 0
Biography,              006/008BooksBiography,         34, 1, _
Language,               Language,                      35, 3, eng
Modified Record,        008ModifiedRecord,             38, 1, _
Cataloging Source,      008CatalogingSource,           39, 1, d
```

Figure A-15. Sample template configuration stanza from a Bmarcfix.cfg file

IMPORTANT:
You can only modify column 1 and column 5 in this particular stanza type, unless a new MARC standard is implemented or an error is discovered.

Column 1

The first column of the stanza is the description that is displayed for a particular tab in the Cataloging module. See Figure A-17. This column can be changed to match your preferences such as for internationalization purposes.

Column 2

This column is used for two purposes.

- To define the name of the drop-down menu stanza name that will define the valid values for that particular drop-down menu.
- To define that field as a text box (non-drop-down menu box) at which point a stanza defining the textbox is not required.

For the latter, the keyword `<<<TEXT>>>` is used.

NOTE:
<<<TEXT>>> is a reserved term used to describe to the program that the grid cell has text entered into it from the user and not from a drop-down menu stanza. When using this value, a mask value has to be entered into the last column of the stanza. See Column 5 on page A-20 for a description of mask values. Any attempt to use this value for a drop-down menu stanza name will be ignored by the system, and it will automatically be made into a text box.

Column 3

This column defines the character position of this value in the record (integer value) as defined in the MARC standard.

Column 4

This column defines the length of the selection. This should match the length of the key of the drop-down menu selection (integer value).

Column 5

This column serves two purposes.

- Default value for the drop-down menu.
- Mask for the text box.

Although the default for this column is a value set by Endeavor to be appropriate for all users (_ for Unknown or not specified), you can change it if you wish. If you do change it, make sure the value is valid, or an unpredictable error may occur.

TIP:
Make a backup copy of every locally edited configuration file in a separate file location.

If the default for the drop-down menu does not exist in the possible list of selections, nothing will be displayed as a default; and you can still make other selections as normal. The text mask is defined to use the following characters. See Table A-1.

Table A-1. Text Masking Options

Text Mask	Description
0	any digit
9	any digit or space
#	any digit or sign
L	any letter
?	any letter or space
A	any letter or digit
a	any letter, digit, or space
&	any character

Thus, in Figure A-16, you can enter any combination of 4 digits or spaces for the **Date 1** field. The number of characters in the mask must equal the fourth column entry.

```
[008_Books]
Publication Status,     008PublicationStatus,       7, 1, _
Date 1 (yyyy),          <<<TEXT>>>,                 8, 4, 9999
```

Figure A-16. Using Text Mask Characters in [008_Books] Stanza

The sample template configuration stanza in Figure A-16 results in the template in the Cataloging module as seen in Figure A-17.

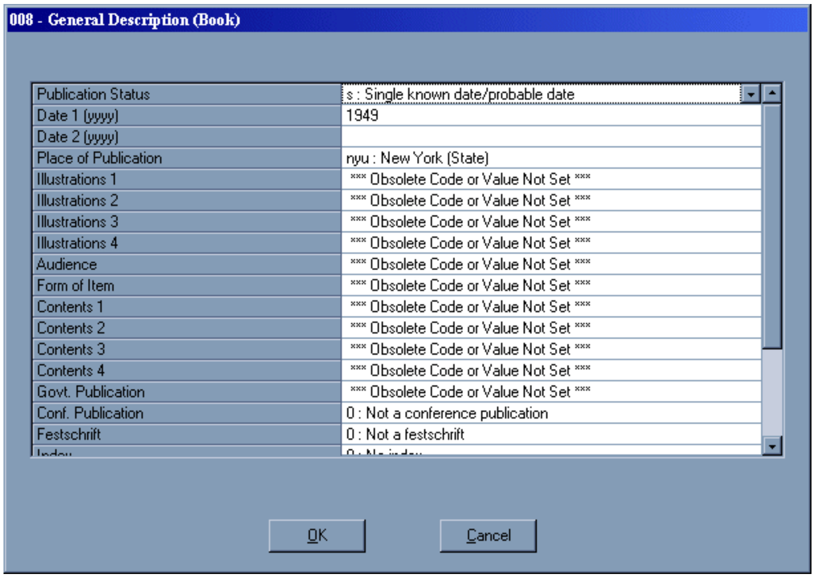

Figure A-17. Result in Cataloging module of the sample template configuration stanza

Drop-Down Menu Selections Stanzas [xxx]

In these stanzas, you input all the selections you want available from the drop-down menus for the fixed field grids in the Cataloging module. A sample stanza indicating drop-down menu selections for books is highlighted in Figure A-18.

```
[006/008BooksBiography]
_=No biographical material
a=Autobiography
b=Individual biography
c=Collective biography
d=Contains biographical information
|=No attempt to code
```

Figure A-18. Sample stanza defining drop-down menu options for the 006 and 008 fields

NOTE:
You can input drop-down menus for more than one field. In Table A-18, the values for the drop-down menu pertain to both the **006** and the **008** fields.

The stanza in Figure A-18 generates the drop-down menu shown in Figure A-19 to display in the Cataloging module.

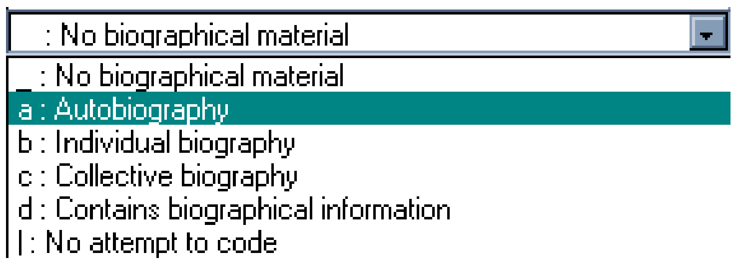

Figure A-19. Result in the Cataloging module of the sample drop-down menu stanza

Shortcut for Entering Numerical Data

When working with numerical data and the program sees a ~ (tilde) to the left of the equal sign, it creates a list of values for these numbers and inserts them into the drop-down list. The values on either side can be positive or negative, and can go in ascending or descending order. However, they must be whole integer values (from `-32,768` through `32,767`). The left side of the tilde gets displayed first and the right gets displayed last. Input the numerical range of `001` to `999` for running time as `001~999=Running time`.

NOTE:
The ~ (tilde) character is used in the key portion of the drop-down menu stanzas to expand a numerical range in the drop-down menu instead of typing out the entire range. Using this value in the key of a drop-down menu stanza especially with non-numerical data can have unpredictable results. Avoid using it in this way.

Voyager Call Number Logic / Processing

B

Call Number Indexing

In Voyager 2001.1, call number functionality is expanded to provide greater flexibility with different classification schemes, the rules used to determine how call numbers are indexed. Voyager is enhanced to recognize and store 852 information specified with a first indicator of 7 and an associated code in subfield 2 (‡2). This enhancement applies to both online and bulk call number entry and update for specific ‡2 codes.

Voyager uses 852 first indicator values 0 - 3, 7, and 8 as defined in the MARC 21 Format for Holdings Data. See Table B-1 for a detailed list of 852 first indicator values.

Table B-1. 852 first indicator values

1st Indicator Value	Description
blank	No information provided. (Blank also indicates *not* indexed.)
0	Library of Congress (LC) classification.
1	Dewey Decimal classification.
2	National Library of Medicine (NLM) classification.
3	Superintendent of Documents (SuDOC) classification.
7	Source specified in subfield 2
8	Other scheme

Additionally, non-standard values "c" and "u" are used by Voyager. See Table B-2.

Table B-2. 852 first indicator non-standard values

1st Indicator Value	Description
c	Canadian Commissioner of Documents (CACODOCS) classification
u	Universal Decimal Classification (UDC)

Several subfield 2 codes used in combination with first indicator 7 are implemented in Voyager 2001.1. These codes identify the rules for sorting and normalizing call numbers for different classification schemes. See Table B-3 for a list of these codes.

Table B-3. Subfield 2 Codes

‡2 Codes	Description
cacodoc	Canadian documents.
oldyale	Old Yale classification.
udc	Universal Decimal Classification.
cammain	Cambridge main library classification.
cammed	Cambridge medical library classification.
camgen	Cambridge generic library classification
dnal	National Agricultural Library (NAL) classification

NOTE:
The CACODOCS classification and the UDC classification can be specified in two ways. See Table B-4.

Table B-4. CACODOCS and UDC classifications

1st Indicator Value	Subfield Value	Description
7	‡2 cacodoc	Canadian Commissioner of Documents (CACODOCS) classification
c		Canadian Commissioner of Documents (CACODOCS) classification
7	‡2 udc	Universal Decimal Classification (UDC)

Table B-4. CACODOCS and UDC classifications

1st Indicator Value	Subfield Value	Description
u		Universal Decimal Classification (UDC)

With these changes to Voyager 2001.1, creation of other non-standard classification codes is possible as a special request. For other non-standard codes to be implemented, normalization rules need to be written and codes added to the Voyager schema as valid codes. Use of any new non-standard code requires a call number index regen to index the existing records with this code. To place a request for development of a non-standard classification code, contact Endeavor Customer Support.

IMPORTANT:
For libraries upgrading to Voyager 2001.1 and currently using the UDC, Old Yale, or Cambridge classification schemes, a call number index regeneration is required.

Call Number Sorting and Searching

There are two aspects to sorting and searching by call number that are of significance relative to Voyager's processing logic.

- How the data is interpreted and stored when input to a Voyager database (How records are saved).
- How the search text is processed and results displayed for a call number search (how users search).

How the data is stored/normalized determines how it can be sorted and search results are affected not only by how the data is stored but also by how the search text is processed.

Call Number Input/Normalization Process (Records Saved)

When a call number is entered into the database, Voyager evaluates what type of call number it is such as LC, Dewey Decimal, National Library of Medicine, Cambridge Main, and so on. Once this type is determined Voyager uses a corresponding classification scheme (see Table B-1, Table B-2, and Table B-3) that contains the rules used for normalizing the call number. The process of normalizing the call number formats the call number so that Voyager can more accurately search and sort call numbers. For example, alpha characters are stored in their uppercase format to insure consistency in sorting.

To identify a holdings record as using the Cambridge Main classification scheme, the following, for example, can be specified.

```
852 7_ ‡b CAT ‡h S250.c.200.16 ‡2 cammain
```

This example uses a combination of first indicator 7 and subfield 2 (‡2) to identify the classification scheme. The first indicator or the first indicator in combination with a subfield in the MARC 21 Format for Holdings Data (MFHD) identifies which classification scheme is to be used for formatting the call number for storage in Voyager.

Call Number Searching and Display Results

Voyager normalizes the content of the search text entered for a call number index search. Similar to the process used when storing call number information, Voyager evaluates the search content to determine if the call number fits the LC classification scheme, the Dewey Decimal classification scheme, and so on. It then processes the normalized search content against the normalized call number field to generate a list of results.

NOTE:
The classification schemes utilized by a library are identified and stored in the system at implementation time and, in general, are not changed. Additionally, at implementation time, the processing order of the classifications schemes is specified. Typically, the LC classification scheme is identified as the first classification Voyager checks when processing a call number. However, for libraries using other classification schemes more commonly, the more commonly preferred classification scheme can be identified as the first to process against by Voyager.

Voyager with Unicode Considerations

C

Voyager with Unicode Overview

The implementation of Unicode in the Voyager product set is scheduled in phases.

The first phase of the Unicode implementation includes the following.

- Cataloging
- WebVoyáge
- Search and MARC Display Functions in the Acquisitions, Circulation, and Media Scheduling modules

The remaining Voyager modules continue to support data in the Latin-1 format.

Function Enhanced in Cataloging for Font Options and Input of Non-Roman Text

Operators can search for, display, and edit the contents of all MARC records using Unicode whether or not the record contains non-Roman characters.

The font in the Cataloging module can be changed to support a variety of languages. See Procedure 10-1, Changing Colors and Fonts, on page 10-17 for more information.

The Voyager with Unicode release supports all the standard Microsoft® Windows™ keyboard and input methods allowing cataloging staff the ability to input non-Roman text using any standard keyboard.

With the flexibility of Voyager with Unicode, it is possible to input text that is not part of the MARC21 standard. Optionally, the Cataloging module provides a feature that can be selected to validate that a Unicode record contains only characters that conform to the MARC21 standard. See Validation Tab (Figure 10-2) on page 10-4 for more information.

Characteristics of a Unicode-Formatted Record in Voyager

Unicode-formatted records can be identified by the ninth position of the Leader. The ninth position contains the letter `a`. See Figure C-1.

Non-Unicode records contain a space in the ninth position.

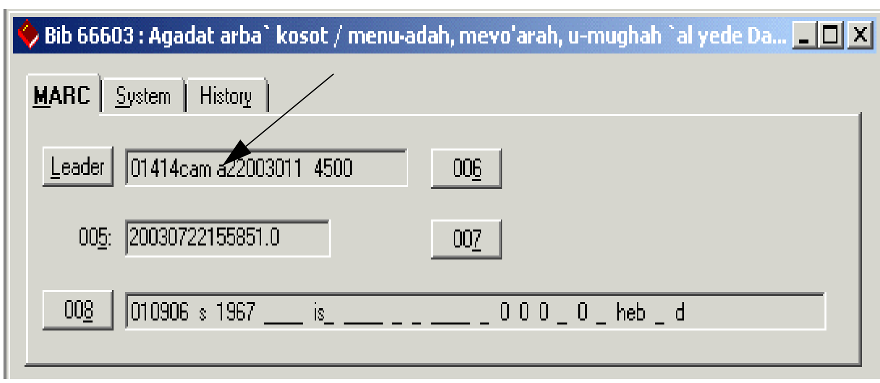

Figure C-1. Leader Ninth Position

NOTE:
Tag tables do not allow anything to be specified for position 9 in the Leader since it is used to identify Unicode records.

Diacritics and MARC21 Compliance Considerations

Diacritic characters have two components, the alphabetic character and the diacritic symbol. For example, ç is made up of c and ¸.

Non-Unicode databases store the diacritic symbol followed by the alphabetic character as two separate characters. For example, français is stored as fran¸cais. This practice of storing characters is influenced by the MARC21 standard.

Unicode databases store the alphabetic character first and then the diacritic character as two separate characters. For example, français is stored as franc¸ais. Also, the diacritic character may be stored as a single entity such as ç.

It is possible that when using certain Windows-based programs, diacritic characters are generated with a different internal value that allows the two components to be stored as one character. This may occur in the Voyager environment when you copy a diacritic character from a Windows-based program and paste it into a Voyager record. Voyager has the flexibility to store the diacritic character in this alternative format as a single character.

NOTE:
Even though a diacritic character may be stored as two separate components, the system displays it as one character.

MARC21 Compliance Considerations

When exchanging records with MARC21 compliant systems, the standard dictates that in almost all cases the diacritic character be stored as two component pieces, the diacritic symbol first followed by the alphabetic character.

When exporting from the Voyager with Unicode system, simply indicate MARC21 MARC8 code `M` with the `-a` parameter (`-aM`) when running bulk export; and the system handles the order of the alphabetic character and the diacritic for the receiving MARC21 compliant system. See the *Voyager Technical User's Guide* for more information regarding bulk export.

Additionally, you can use the decomposition feature selectable on the **Validation** tab in Session Defaults and Preferences in the Cataloging module (see Validation Tab (Figure 10-2) on page 10-4 for more information) to translate single-entity, non-Roman characters into two components so that there is an alphacharacter and diacritic for MARC21 compliance.

Considerations for Records Imported or Converted to Unicode

For existing Voyager systems, records in the database need to be converted to the Unicode UTF-8 encoding for the Voyager with Unicode release. This process is separate and distinct from importing non-Unicode records into an existing Voyager with Unicode database.

See Database Conversion on page C-4 and BulkImport on page C-8 for a description of the conversion and import processes and considerations.

(See the *Voyager Technical User's Guide* for information about exporting records from a Voyager with Unicode database.)

Database Conversion

When a non-Unicode Voyager database is converted to a Voyager with Unicode database, the following record processing occurs.

- Each record is analyzed to determine if it is a Unicode encoded record. (The system checks the ninth position of the Leader. See Characteristics of a Unicode-Formatted Record in Voyager on page C-2.)
- Non-Unicode records are converted to the Unicode UTF-8 encoding format.
- Any non-recognizable characters are replaced with a Unicode substitution character
- Records that cannot be converted to Unicode are viewable in the Cataloging module with **nc** (not coverted) displayed in the Title Bar. See Non-Converted Records (nc) on page C-4 for more information.

  Also, if appropriate options have been selected in Session Defaults and Preferences, non-converted records display in a different color. See Colors/Fonts Tab (Figure 10-8) on page 10-16 for more information.
- Log files are generated as part of the conversion process. See Message Logs on page C-5 for more information. These log files can be used to diagnose records that do not convert successfully to Unicode UTF-8 encoding.

Non-Converted Records (nc)

A non-converted record can be viewed and corrected in the Cataloging module and subsequently saved as a Unicode record.

IMPORTANT:
For a record to display in the Cataloging module, there must be an a *in the 9th position of the Leader. Therefore, you see both* ***nc*** *in the Title Bar and an* a *in the 9th position of the Leader. This may seem like a contradiction. However, the letter a in the 9th position of the Leader does not become a permanent component of the record until the record is saved to the database.*

CAUTION:
Be certain to make all corrections to the ***nc*** *record before saving it to the database. When the* ***nc*** *record is saved to the database, the letter* a *is stored in the 9th position of the leader permanently identifying the record as Unicode formatted along with any remaining inaccuracies and substitiute characters.*

Message Logs

The database conversion process produces a log file for bibliographic, holdings, and authority records. The log files are named as follows.

- log.#####.bib
- log.#####.mfhd
- log.#####.auth

  (where ##### is the job/process ID number)

Records containing fields that fail to convert to Unicode are still visible in the Cataloging, WebVoyáge, Aquisitions, Circulation, and Media Scheduling modules subsequent to the conversion process.

A review of the records with errors is necessary to make corrections not handled by the conversion process. The error (warning) logs provide a variety of useful information to assist with the reivew of records with errors. See Table C-1, Table C-2, Table C-3, and Table C-4 for a description of the information that is provided.

NOTE:
There are two levels of error and warning messages, record-level and field level.

Table C-1. Record-Level Warnings & Errors

Warning/Error	Description
leader 9 is not space	This is a warning. An attempt is made to convert from Voyager encoding to Unicode. This warning may indicate corrupt data or reflect a staff input error.
leader 9 is ‘a’	This is an error. There is not attempt made to reconvert a record that is already defined as a Unicode record.
066 Error	This is an error. This indicates that the character sets in the 066 are not supported by the converter.

Table C-2. Log Information Provided for Field-Level Warnings & Errors

Warnings & Errors Information Provided
The record type and ID of the record.
The index within the record of the field that generated the error. (This is the index within all the field of the record not within fields with the same tag.)
The tag of the field that generated the error.
The text `c->8` indicates that the conversion was from Voyager encoding to Unicode.
The error type is specified as follows. • `Page=` indicates to which code page (MARC character subset) the source character belongs. This is a number that corresponds to specific code pages. See Table C-3 for a list of the code pages. • `At` indicates the position within the field of the source character that caused the problem. • A hexidecimal dump of the source character and the following seven characters is provided. • An ASCII dump of the source character and the following seven characters. If the source character or any following characters are control characters or diacritics (their code point value is not between 32 and 127), they display as periods.

Table C-3. Code Page Numbering

Code Page Number	Description
0	Latin text with ALA diacritics
1	CJK characters (the EACC set)
2	Arabic
3	Cyrillic
4	Greek
5	Hebrew
6	MARC-8 Greek characters (alpha, beta, gamma) (Logged as a loose translation)
7	MARC-8 superscript and subscript numbers (Logged as a loose translation)

Table C-4. Specific Warnings & Errors

Warning/Error	Description
loose char	This is a warning. This indicates that a character that is not strictly part of the Voyager encoding has been converted. Carriage returns, line feeds, and MARC-8 superscript and subscript numbers are some examples of characters that are converted and raise this warning.
no char to combine to	This is a warning. This indicates that a Voyager encoding combining character was stored at the end of a subfield where it lacks a base character to combine to. In this case, the conversion places a space preceding the combining character in the converted record.
undefined char	This is an error. This error occurs when the converter encounters data in the source record that cannot be mapped to Unicode. The specific characters that cannot be mapped differ from code page to code page.

BulkImport

When importing records using BulkImport, the following record processing occurs.

- The system checks the Bulk Import Rule defined in the Voyager System Administration module to determine the character set mapping of the incoming records.

  If MARC21 UTF-8 (the only Unicode encoding option) is selected, the system expects the letter `a` to be stored in position 9 of the Leader. See Characteristics of a Unicode-Formatted Record in Voyager on page C-2 for more information.

  All the other options are non-Unicode, and the system expects a space to be stored in position 9 of the Leader.

- Position 9 of the Leader is analyzed to determine if it matches the Bulk Import Rule specified in Voyager System Administration. If the Leader position does not contain the expected value, the record is not imported and an error is logged in the standard BulkImport message logs.

  For a summary of BulkImport processing and results, see Table C-5.

- After a record passes the check on the 9th position of the Leader, the system converts the remaining fields according to the mapping information provided in the Bulk Import Rule.

  If the record contains characters that cannot be converted, an error is logged in the standard BulkImport message logs; and the record is not imported.

Table C-5. BulkImport Rules / Results

Mapping (Expected Character Set of Imported Records)	Leader Position 9 Contents	Conversion Result	Processing Result
MARC21 UTF-8	a	No Conversion	Load into Database
MARC21 UTF-8	Space		Error Out & Log
OCLC (non-Unicode)	a		Error Out & Log
OCLC (non-Unicode)	Space	Successful	Load into Database
OCLC (non-Unicode)	Space	Failure	Error Out & Log
RLIN legacy (non-Unicode)	a		Error Out & Log
RLIN legacy (non-Unicode)	Space	Successful	Load
RLIN legacy (non-Unicode)	Space	Failure	Error Out & Log
Latin-1 (non-Unicode)	a		Error Out & Log

Table C-5. BulkImport Rules / Results

Mapping (Expected Character Set of Imported Records)	Leader Position 9 Contents	Conversion Result	Processing Result
Latin-1 (non-Unicode)	Space	Successful	Load
Latin-1 (non-Unicode)	Space	Failure	Error Out & Log
MARC21 MARC-8 (non-Unicode)	a		Error Out & Log
MARC21 MARC-8 (non-Unicode)	Space	Successful	Load
MARC21 MARC-8 (non-Unicode)	Space	Failure	Error Out & Log
Voyager legacy (non-Unicode)	a		Error Out & Log
Voyager legacy (non-Unicode)	Space	Successful	Load
Voyager legacy (non-Unicode)	Space	Failure	Error Out & Log

Subfield Character

The subfield character (‡) continues to be recognized as a subfield delimiter character and cannot be used as content in a record. It is reserved for this purpose.

The subfield character (‡) can be entered using the following methods.

- Enter the character from the keyboard
- Click Edit > Insert Subfield (F9)
- Select Options > Preferences > Add a subfield ‘a’ to a new field

Cataloging Templates

Templates created in the Cataloging module starting with the Voyager with Unicode release must be created as Unicode templates. This implies that the ninth position of the Leader must be set to `a`. See Characteristics of a Unicode-Formatted Record in Voyager on page C-2 for more information.

Analyzing Inconsistencies

There are different options for diagnosing inconsistencies in Unicode text.

Hexadecimal Value

One method for determining the hexadecimal values of non-Roman and Roman characters is to copy the text into an editor such as Microsoft WordPad and use `Alt+Shift+x` to display the hexidecimal value.

Resources

For more information on a variety of topics related to Unicode, browse the following site.

www.unicode.org

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