

Voyager 9.1.1 Cataloging Client Session Defaults and Preferences Configuration for I-Share Libraries

To configure Session Defaults and Preferences in the Voyager Cataloging Client, on the menu bar select **Options**, then **Preferences**.

For detailed explanations of the defaults and preferences, consult Chapter 10 of the *Voyager Cataloging User's Guide*.

The screenshots in this handout are based on the options from a test database. When you work with your library's database, the configuration decisions made in your System Administration will affect which options you have.

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

REMINDER: Session defaults and preferences are PC-specific. Anyone who logs onto the PC will see the same defaults and preferences. If you set defaults and preferences on one PC and then move to a different PC, the defaults and preferences will not follow you. Also, when you install a new version of the Voyager clients, preferences may need to be reset; therefore, you may want to make screen prints, use the Preferences Worksheet, or record elsewhere the preferences you've selected, so that you can more easily reset your preferences in the new client version. This record of preferences settings would also be useful for new staff.

These settings are defaults. Some of these choices may be changed for individual records as you are working. In addition, you can come back into session defaults and preferences at any time and change the settings.

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GENERAL TAB

Session Defaults and Preferences

General | Validation | Workflow | Item Defaults | Folders/Files | Mapping | Colors/Fonts

Holdings/Item default location: Stacks

Call Number Hierarchies: LC

Bibliographic Import/Replace Profile: OCLCConditional

Authority Import/Replace Profile: AuthReplace

Delete records from work files once saved to database

Delete records from import file once saved to database

Add a subfield 'a' to a new field

Display MARC Views maximized

OK Cancel

Holdings/Item default location

This setting determines the default location for any holdings or item records created during a cataloging session. Select the location for the materials you regularly catalog.

Call Number Hierarchies

If desired, select the appropriate call number scheme for the materials you regularly catalog. This lets the Voyager system know from which field in the bibliographic record to retrieve the call number for the MFHD.

Bibliographic Import/Replace Profile

CARLI strongly recommends that you choose OCLCConditional. These profiles are defined in System Administration and specify what actions are taken when duplicate records are found during an import. *If this box is left at (None), then every record imported (from the UC, OCLC, etc.) will be added to the database, with no checks for duplication.* Therefore, your library will probably want to have an option selected for this box, so that some sort of duplicate detection will be performed when records are imported.

Authority Import/Replace Profile

Select the appropriate authority import/replace profile according to your library's policy. These profiles are defined in System Administration and specify what actions are taken when duplicate authority records are found during an import of an authority record.

Delete records from work files once saved to database

Work files are where records are saved for further work before they are saved to the database. Check this box if you wish to delete the saved record from your work files as you save records to your database. If you do not check this box, your work files will remain unchanged until you manually clear or delete the files.

Delete records from import file once saved to database

Check this box if you wish to delete the saved record from your import files as you save records to your database. If you do not check this box, your import files will remain unchanged until you manually clear or delete the files.

Add a subfield "a" to a new field

Check this box if you wish to have a subfield "a" automatically added any time you insert a new field.

Display MARC views maximized

Check this box if you wish MARC records to be maximized to fill your Voyager screen.

VALIDATION TAB

The screenshot shows the 'Session Defaults and Preferences' dialog box with the 'Validation' tab selected. The 'Cataloging formats' dropdown is set to 'Oclc'. There are several checkboxes for bypassing validation: 'Bypass MARC Validation' (unchecked), 'Bypass MARC21 Character set validation' (unchecked), 'Bypass Authority Control Validation' (unchecked), 'Bypass Decomposition of accented characters for MARC21' (unchecked), 'Bypass ISBN validation' (unchecked), and 'Bypass ISSN validation' (unchecked). The 'List all the errors' radio button is selected, with 'Show errors one at a time' and 'Display all the headings' (checked) also visible. The '856 link servers' section has input fields for URN, DOI, and Image Server. The 'Heading Types' section has checkboxes for Name, Title, Name/Title, Subject, and Subdivision, all of which are checked. 'OK' and 'Cancel' buttons are at the bottom.

Cataloging formats

Choose OCLC. The format selected here is the one used for validation.

Bypass MARC validation

If this box is checked, records saved to the database will **NOT** be validated against the MARC tag tables. For best quality assurance, CARLI strongly recommends that this box **NOT** be checked. If you do not check this box, you can select whether to receive a list of all errors or to see individual errors one at a time.

Bypass MARC21 Character set validation

If this box is checked, records will not be validated against the MARC21 character set when you save a record 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. CARLI strongly recommends that you leave this option unchecked.

Bypass Decomposition of accented characters for MARC21

If this box is checked, it will prevent the decomposition of characters for MARC21. CARLI strongly recommends that you leave this option unchecked to fully comply with MARC21.

Bypass ISBN validation

If this box is checked, records saved to the database will **NOT** be validated for an incomplete or invalid ISBN number in 020 \$a or 024 \$a (when first digit is 3). For best quality assurance, CARLI strongly recommends that this box **NOT** be checked.

Bypass ISSN validation

If this box is checked, records saved to the database will **NOT** be validated for an incomplete or invalid ISSN number in 022 \$a or \$z. For best quality assurance, CARLI strongly recommends that this box **NOT** be checked.

Bypass Authority Control validation

If this box is checked, records saved to the database will **NOT** be validated against your authority records. For best quality assurance, CARLI strongly recommends that this box **NOT** be checked. If you do not check this box, you will have the option to either display all the headings in the Authority Validation dialog box or only the headings in error.

Heading Types

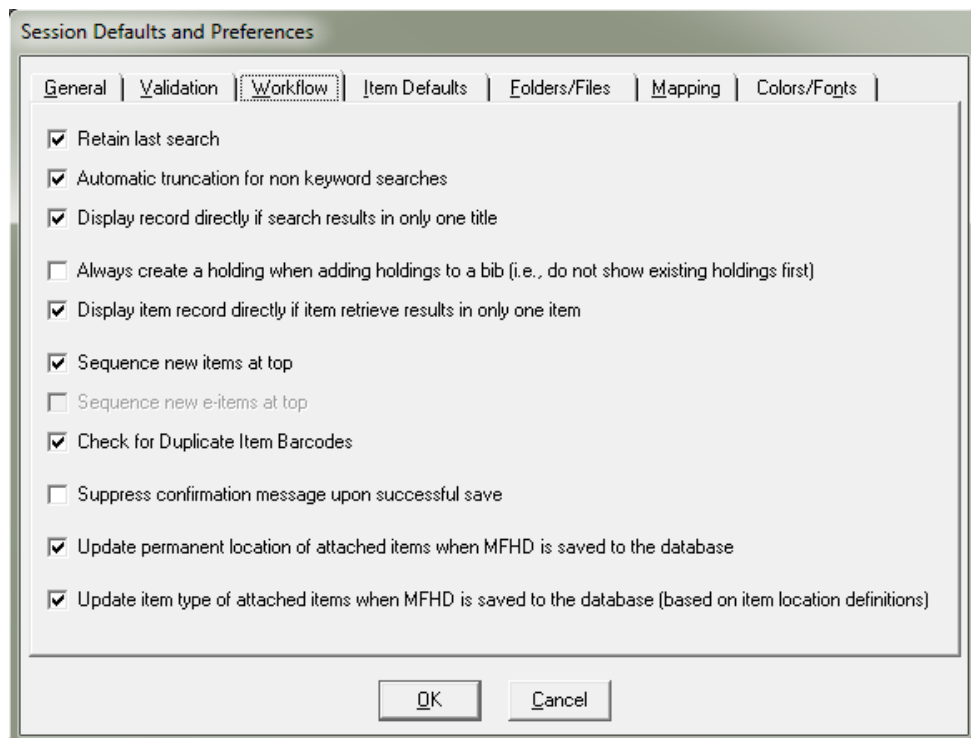
Select the types of heading that you would like to display in the Authority Validation dialog box. It is recommended that when the library first implements Voyager that "Display all the headings" is checked/enabled. CARLI strongly recommends that all of the "Heading Types" boxes should be also checked.

However, the option for "Display all the Headings" is at the user's discretion. If "Display all the headings" is checked, Voyager will show valid, invalid, and partially valid headings when it checks the record against the authority file. Leaving the "Display all the headings" box unchecked will result in the display of only those headings that Voyager finds invalid or partially valid. If the record has no invalid or partially valid headings, you will only see the "Record successfully updated" message. After the library has been using Voyager cataloging for a while, operators may wish to not view valid headings, but only headings that potentially require additional authority control work.

856 Link Servers

Not applicable to the CARLI I-Share Voyager implementation at this time, so leave blank.

WORKFLOW TAB



Retain Last Search

Select this checkbox to save the last search performed in the Search dialog. Many catalogers find this option to be very useful and have it checked.

Automatic truncation for non-keyword searches

Select this checkbox to automatically truncate non-keyword searches without requiring the question mark (?) as a truncation character. CARLI strongly recommends that this option be checked.

Display bibliographic record directly if search results in only one title

Select this checkbox to automatically display a bibliographic record if only one record is available as a result of the search. CARLI strongly recommends that this option be checked.

Always create a holding when adding holdings to a bib

Select this checkbox to automatically add a new holdings to a bib record without first displaying the existing holdings already attached to that bib. CARLI strongly recommends that this option **NOT** be checked to help prevent duplicate holdings from being created.

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

Select this checkbox to automatically display an item directly if only one record is available as a result of your search. CARLI recommends that this option be checked.

Sequence new items at top

This option is used when creating a new item record to add the new item at the top of the sequence instead of the default position (the bottom of the list). Many catalogers find this option to be useful and have it checked.

Check for duplicate item barcodes

If this is marked, when a user adds an item record or a barcode to an existing item, the software will check to see if the barcode is already used in other items. If so, the user gets a warning to that effect and has the option to cancel the add item or the add barcode operation, OR to go ahead and save anyway. CARLI strongly recommends this option be checked, because of the potential disruption to circulation and UB activities when duplicate barcodes are encountered in a database.

Suppress confirmation message upon successful save

Select this checkbox to suppress the confirmation message that displays after a record has been successfully saved to the database. Doing so will also suppress the confirmation message for updates to the permanent location and item types of attached items when the MFHD location is saved. Many catalogers find this option to be useful and have it checked after becoming accustomed to Voyager.

Update permanent location of attached items when MFHD is saved to the database

Select this option to automatically update the item permanent location to match the MFHD location when the MFHD record is updated. CARLI strongly recommends selecting this option to keep MFHD location and permanent location in the item record in sync.

Update item type of attached items when MFHD is saved to the database (based on item location definitions)

Once “update permanent location of attached items when MFHD is saved to the database” is selected, the option to automatically update the permanent item type to match the initial default item type is enabled. Select this option will ensure the item type updates to the initial default item type for the MFHD location when a MFHD’s location is updated. The initial default item type is set for each location in Voyager System Administration, Cataloging Policy Definitions, on the Locations tab.

ITEM DEFAULTS TAB

Session Defaults and Preferences

General | Validation | Workflow | **Item Defaults** | Folders/Files | Mapping | Colors/Fonts

Item Type: Book 16-4W

Temp. Loc.: Status:

Temp. Type: Stat. category:

Enum: Copy: 1

Chron: Pieces: 1

Year:

Caption:

Free text:

Spine:

Self Check

Magnetic Media Sensitize

OK Cancel

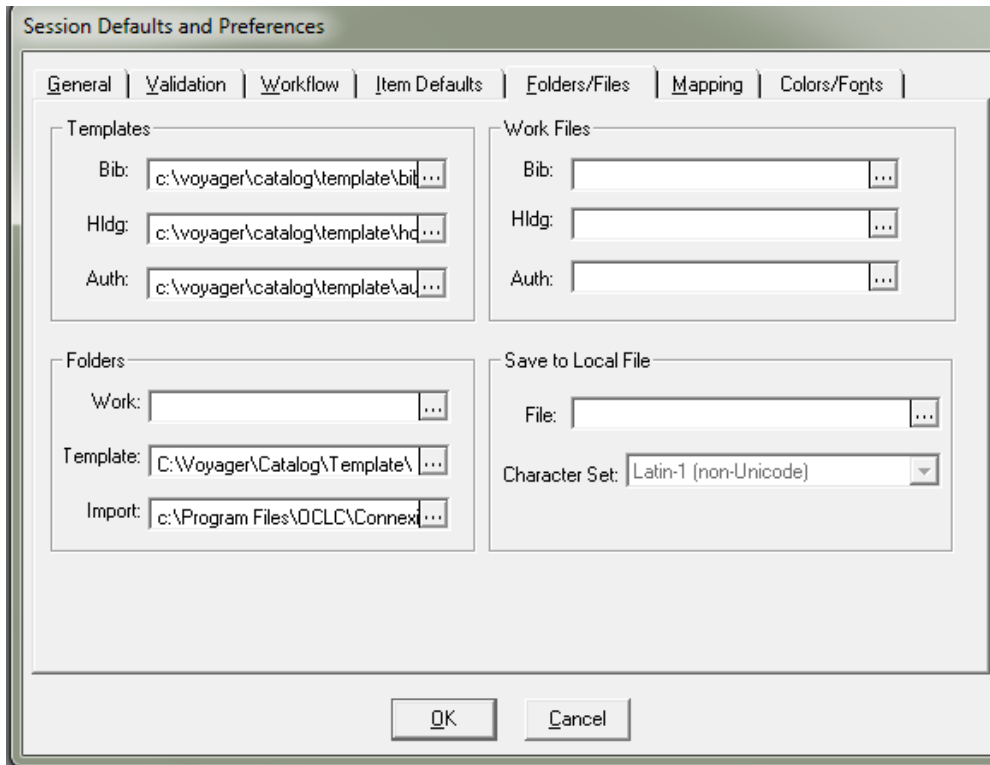
Item Type

Use this to select the default item type for all item records that you create. If you work with non-book materials, you may need to select an item type other than book. Selecting nothing (blank space) for the item type will result in the initial default item type of the Cataloging Happening Location being added to new item records, regardless of the location set in the MFHD.

The other fields may be left blank; however, the default **Copy** number should match the default number chosen for your library (this was “1” for most I-Share libraries upon migration to Voyager).

Complete any of the other information under the Item Defaults Tab if you are creating records that might have the same information for some (or all) of the default fields. For the fields with drop down menus, you can select the blank space at the top of the drop down if you do not want to select a default.

FOLDERS/FILE TAB



Note: The file and folder names and paths are local library decisions.

Templates In the templates block, you can type the entire path for the appropriate template in the appropriate box. The filename may have any extension. You can also click the ellipses to select the template you want from the appropriate directory. Voyager will notify you if you type or select a template name that does not correspond with the type of record you have selected.

Examples using the default Voyager templates:

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

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

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

If you wish to select the appropriate template each time you create a new bib or authority record, instead of having a specific template appear, then leave these boxes empty. Alternatively, you can specify the folder from which to select the template in the Folders block.

Folders

In the folders block, you can enter or select a default folder so that when you open a work record or template or import a record, you open to the correct folder to save time. The folders you enter here are intended as the default folder in which to save records to work files. If you need to save your work for review by others, you can save work files to a shared folder that can be accessed by the person reviewing the work.

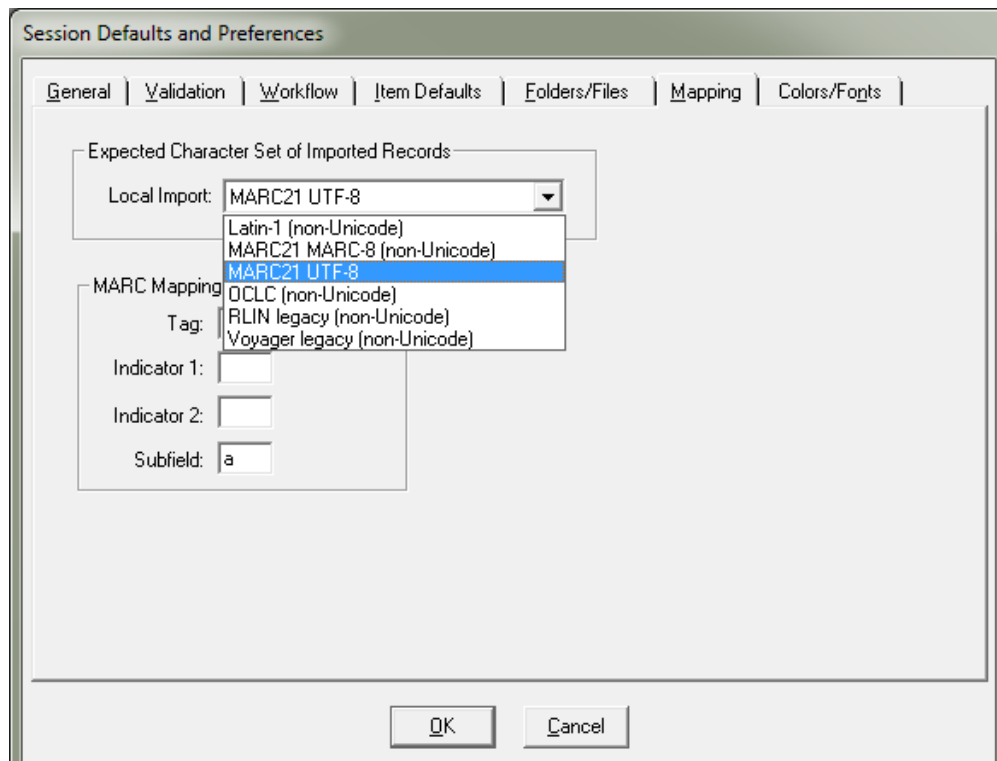
Work Files

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

Save to Local File

In the save to local file block, you can specify the file to which you want bibliographic records to be saved when you Save to Database and to Local File option (with or without Close). Click the Character Set drop-down arrow to select the character set format in which you want the records to be saved. The Unicode character encoding option is MARC21 UTF-8. Note: If no filename is entered into the File field, the Save to Database and to Local File option will be disabled. If the file is specified but does not currently exist, it will be created at the next Save to Database and Local File.

MAPPING TAB



Expected character set of Imported Records, Local Import

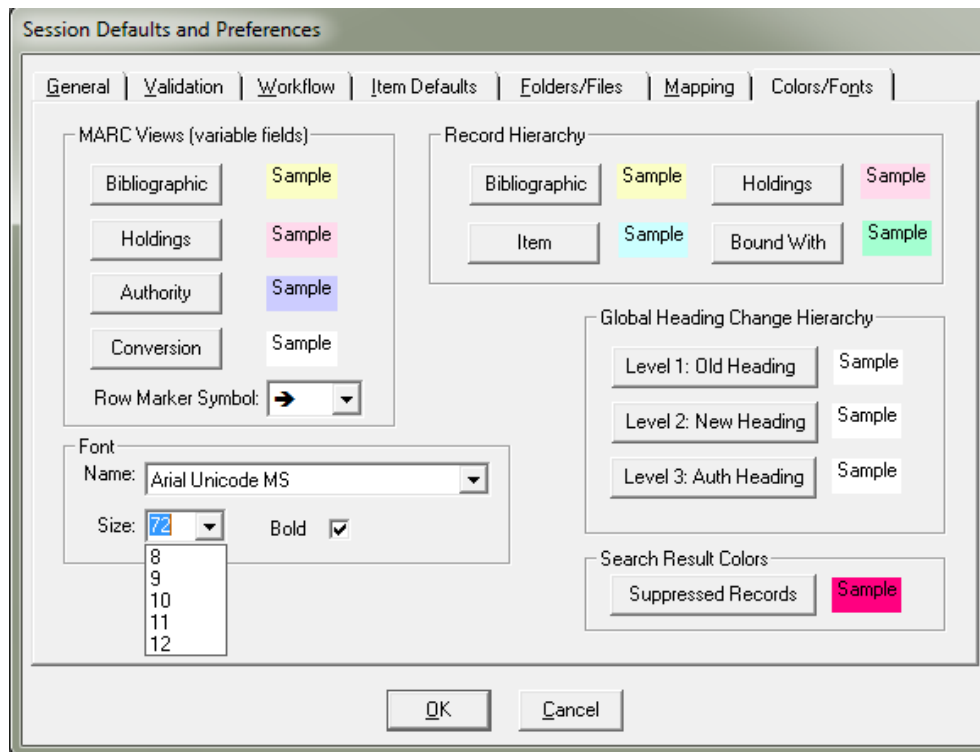
Use the Import drop-down menu to select the appropriate character set of the incoming records when manually importing records online. These records could be from the Universal Catalog, exported from OCLC, etc. It may be necessary to change this setting depending on the source and character set of the incoming records.

Most I-Share libraries set their OCLC Export format option to be Unicode, and then set the preference value above to be “MARC21 UTF-8” which is also Unicode. When the format of the incoming record is Unicode and this preference value is set to MARC21 UTF-8, the operator should not receive any error messages from the cataloging client during record import.

MARC mapping for OCR data

This feature is used specifically in conjunction with Image Server, and therefore is not applicable to the CARLI I-Share Voyager implementation at this time.

COLORS/FONTS TAB



Font

Voyager 9.1.1 databases are Unicode-enabled. For best results when displaying records in the Voyager clients, the PC must have a Unicode font installed, and the clients need to be configured to use that Unicode font.

Unicode fonts:

By nature of the minimum PC requirements for Voyager, all PCs will have at least one Unicode font installed: **Lucida Sans Unicode**. This font is not as fully compliant with the Unicode standard as other options so some characters may not display as expected.

Microsoft's font **Arial Unicode MS** was distributed through MS Office packages (e.g. MS Word, Excel, etc.) prior to 2016. Arial Unicode MS is a better option for records in multiple languages since it is more compliant with the Unicode standard than Lucida Sans Unicode.

As an alternative to Arial Unicode MS, Google's open font family called **Noto** is a good option for PCs with Windows 7 or newer versions. From the Noto font family webpage, select the option to download all of the fonts in the Noto font family: <https://www.google.com/get/noto/>. Then, after extracting the files, add the fonts to your computer's fonts folder at C:\Windows\Fonts folder. Finally, select the parent group "**Noto Sans**" in the Voyager cataloging client – Options – Colors/Fonts tab – Font name.

Size

Font size can be configured from 8 points up to 72 points. This setting controls the font size in the MARC record display, fixed field grids, and when a record is printed. The default drop down only lists 8-12 points, but larger font sizes may be typed directly into the font size box. Be aware, however, that changes to font sizes may affect your ability to see all of the information in the bibliographic record. For example, if the font is set small (8 or 9 points), diacritics may not display properly. If the font is set very large you may have to scroll more to see all the information or stretch the client window over two monitors.

Bold

Selecting the Bold flag will display the variable field text in bold.

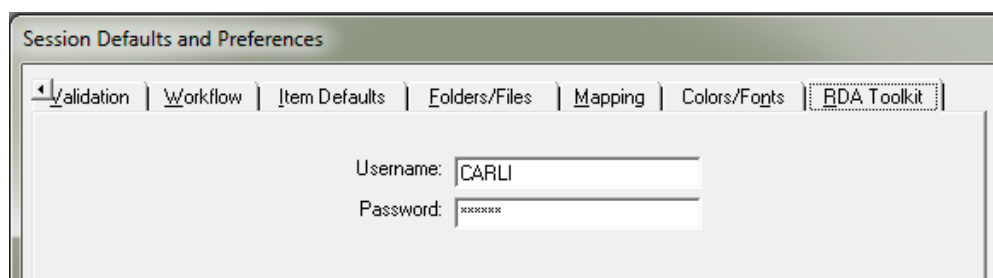
Colors

You can adjust the text and background colors, as well as select a specific row marker symbol for viewing MARC records. Text and background colors may also be selected for the record hierarchy view, Global Headings Change hierarchy, and for suppressed records in search results.

(Your library may want to agree internally on colors used for different types of records, to facilitate collaborative work efforts within your library. This may also make it easier to write any local documentation.)

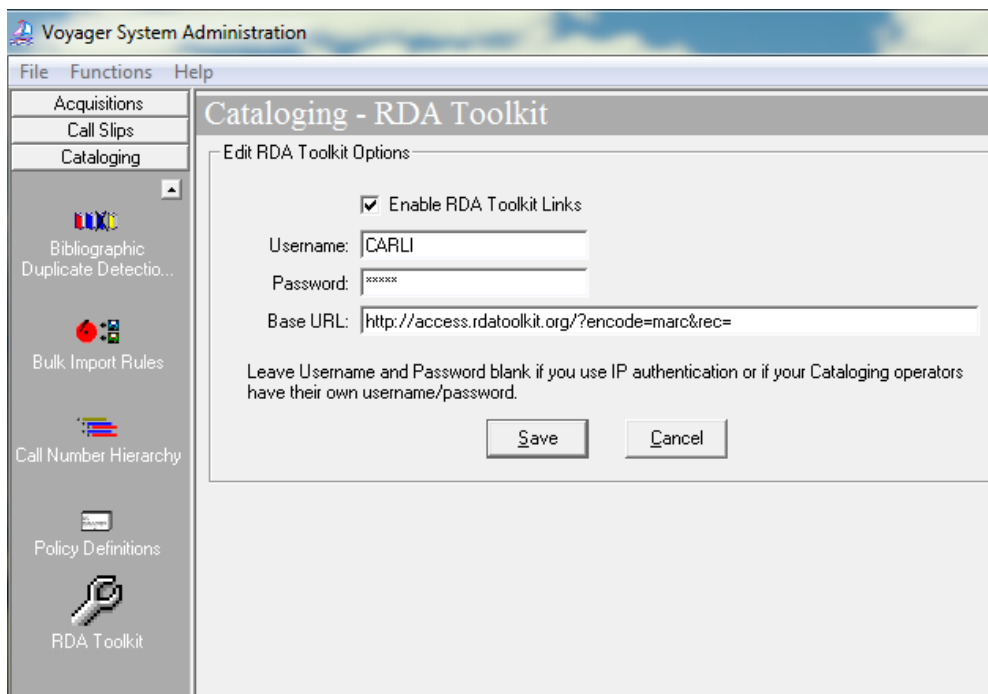
Colors and font settings are PC-specific and will not follow the user to another PC.

RDA TOOLKIT TAB



An RDA Toolkit tab will appear for Session Defaults and Preferences if the RDA Toolkit has been enabled in the System Administration Module, and your library either has IP authentication setup or has individual user-level authentication. If your library has IP authentication, there is no need to enter anything on this tab. If your library has individual user-level authentication, then enter your Username and Password on the RDA Toolkit tab to ensure the “Show RDA Toolkit” content-specific feature functions properly in MARC bibliographic and authority records.

If your library has an institutional username and password, then no RDA Toolkit tab will appear in Session Defaults and Preferences. Instead, your institution’s username and password are entered in the System Administration module under Cataloging, RDA Toolkit.



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