

# Cataloging Templates

## Basics

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Voyager

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# Cataloging Templates

- Basics
- Folders
- Creating new templates
- Editing templates
- Deleting templates

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## Basics

- 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
- MARC record derivations using templates will not be covered in this clip.



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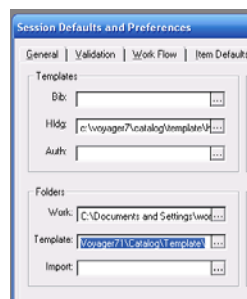
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## Folders

- In Cataloging – Options – Preferences, select the Folders/Files tab
- Check that Folders – Templates is set to your c drive, voyager, Catalog, Templates folder
- Prior to creating new records, Check the default Templates set for Bib, Hldg and Auth Records



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## Creating Templates

1. Select **File>Template>New** from the menu
2. Select the record type (Bibliographic, Authority, or Holdings) from the drop-down menu and click **OK**
3. Create the new template by completing the leader, fixed fields, and variable fields
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



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### Editing Templates

1. Select **File>Template>Edit** from the menu
2. Select the template file you want to edit and click **Open** (or double-click the file)
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 MARC record
4. Select **File>Save** from the menu to save the template with the same name
5. 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



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### Deleting Templates

1. Select **File>Template>Edit** from the menu.
2. Select the template you want to delete and click **Open** (or double-click the template).
3. Select **File>Template>Delete** from the menu.
4. Result: The message "Are you sure you want to delete [the selected template]?" prompts you.
5. Select **YES** to delete the template



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### Creating Templates

#### Notes

- Save with a .tem extension
- Authority and MARC Tag validation do not occur during template creation.
- If a holding template includes the 852 tag, then the call number hierarchy will not be used to create the call number during holding record creation.



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## Resources

For additional information, please consult

**Voyager® 7.1 Cataloging User's Guide**

Thank you!



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