

Recommended Session Defaults and Preferences in the LC ILS Cataloging Module

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M6.1 SUMMARY

DCM M6 presents LC policies on setting session defaults and preferences in the LC ILS cataloging module. M6.2 provides background. M6.3 indicates settings recommended or required in LC.

DCM M6 supersedes former Bibliographic Workflow Training Document #1.

Note: It is most effective to consult DCM M6 with a cataloging session open and the Session Defaults and Preferences dialog box displayed (see M6.2.2).

M6.2 INTRODUCTION

M6.2.1 Background

Session defaults and preferences are choices for LC ILS cataloging module sessions that are set on individual workstations. They reduce effort and help avoid errors by automatically prompting data, system functions, and other variables that you use most often when you are cataloging.

Security parameters established in your profile by your LC system administrator determine some session defaults. Signing on using your operator ID invokes those.

Use the instructions in M6.2.2 to set other preferences on your workstation. LC policies recommend or require certain settings, as presented in M6.3.

Some defaults and preferences depend on factors in your work assignment, such as the specific cataloging workflow and type of material. Change your settings as necessary to assist you in doing work with different parameters (for example, copy cataloging, added copies, reference materials). It helps to organize your work in order to avoid switching preferences constantly.

Note: The information here is current for **Voyager version 10.1.0** in LC. If there has been any further LC ILS system upgrade, consult **the Policy, Training, and Cooperative Programs Division** for advice on changes in recommended cataloging session defaults and preferences.

For more background information on cataloging defaults and preferences, see the *Voyager 10.1 Cataloging User's Guide* on the LC Integrated Library System Program's intranet at https://www.loc.gov/staff/ils/voy10.1docs/V101_Cataloging.pdf.

M6.2.2 Setting Session Defaults and Preferences

With an LC ILS cataloging module session open, view or change defaults and preferences by selecting "Options / Preferences" from the menu bar. That opens the Session Defaults and Preferences dialog box. Options within the dialog box are organized on different "tabs," which are accessible by clicking the tab labels at the top.

On each tab, input or change the settings by means of the mechanisms provided: select from a list, click an option so that it is checked or not checked, or input data. Save selections by clicking "OK." Close the dialog box by clicking "Cancel" if there are no new settings or changes to save or if you do not want to save selections that you made.

Selections are stored when you exit the cataloging module session. Check the preferences on your workstation occasionally, however, to confirm they are what you need for your work, especially if you share the same workstation with other staff members.

M6.3 RECOMMENDED SETTINGS

TAB: Option	Recommended, Required, or Usual	Additional Information
GENERAL: Holdings/Item default location	<i>Most ABA staff:</i> c-General Collections/CMD	Select the location that holdings and item records you create are most likely to use. Select a location other than GenColl if your work usually serves that location (for example, “c-Law Library” for a law cataloger).
GENERAL: Call Number Hierarchies	<i>Most ABA staff (work with full LC classification call numbers):</i> LCclass-050a&b	Select the hierarchy for the kind of call number most likely present in your work. This is necessary for the LC ILS to copy call number data from the bibliographic record into a holdings record’s 852 field.
GENERAL: Bibliographic Import/Replace Profile	<i>Most often:</i> LCCNadd or LCCNmerge <i>(Both now have the same result.)</i>	<i>Only in special workflows:</i> <i>Special materials workflow for which the profile was designed:</i> smcdONLYmerge <i>When using Transliterator (reset to LCCNadd when finished):</i> CIP Ver Replace
GENERAL: Bib Overlay Import/Replace Profile	[Leave as: (None)]	
GENERAL: Authority Import/Replace Profile	<i>Required always:</i> ARLCCNadd	
GENERAL: Default Field Order Configurations: Authority	<i>Required always:</i> AUTH LC field order	

TAB: Option	Recommended, Required, or Usual	<i>Additional Information</i>
GENERAL: Default Field Order Configurations: Bibliographic	<i>Usually:</i> <i>BIB LC field order</i>	
GENERAL: Default Field Order Configurations: Holdings	<i>Required always:</i> <i>HOLD LC field order</i>	
GENERAL: Sort automatically on save	<i>Required always:</i> <i>Checked</i>	
GENERAL: Delete records from work files once saved to database	<i>Required always:</i> <i>Checked</i>	
GENERAL: Delete records from import file once saved to database	<i>Required always:</i> <i>Checked</i>	
GENERAL: Add a subfield 'a' to a new field	Your individual preference	<i>Note:</i> Setting chosen affects results of some macros.
GENERAL: Display MARC Views maximized	Your individual preference	
VALIDATION: Cataloging formats	<i>Required always:</i> UnicodeLCMARC21	"UnicodeLCMARC21" assures only valid MARC 21 tags, indicators, and subfields are saved to the database.
VALIDATION: Bypass MARC Validation	<i>Usually:</i> <i>Not checked</i>	<i>Exception:</i> Change the preference to "checked" and thereby bypass MARC validation only when you cannot save a record because of a MARC validation problem, you cannot resolve the problem without assistance, and that assistance is not immediately available. After you save the problem record, reset the preference right away to "not checked."

TAB: Option	Recommended, Required, or Usual	Additional Information
VALIDATION: Bypass MARC21 Character set validation	<i>Required always: Not checked</i>	“Not checked” assures only MARC 21 Unicode characters are saved to the database and invalid characters generate error messages.
VALIDATION: List all the errors / Show errors one at a time	Your individual preference	
VALIDATION: Bypass Authority Control Validation	<i>Only creating IBCRs, shelflisting, end-stage processing: Checked</i> <i>Otherwise: Not checked</i>	
VALIDATION: Bypass Decomposition of accented characters for MARC21	<i>Required always: Not checked</i>	“Not checked” causes the LC ILS to convert any pre-composed Unicode “letter + diacritic” combination (introduced, for example, by copying text from a Web page) into the decomposed form, that is, letter followed by combining diacritic, which MARC 21 requires.
VALIDATION: Display All The Headings	<i>Recommended: Checked</i>	“Checked” causes the LC ILS authority validation window to display authority records that the system validated as well as those it did not, thereby making access to the authority records easier.
VALIDATION: Bypass ISBN validation	[Leave blank]	Get more reliable ISBN validation by applying Validator (see DCM M7).
VALIDATION: Bypass ISSN validation	[Leave blank]	Get more reliable ISSN validation by applying Validator (see DCM M7).
VALIDATION: 856 link servers	[Do not input & do not change]	
VALIDATION: Heading Types	<i>Recommended: Check all the heading types</i>	<i>Exception:</i> Staff who do not review subject access points may leave “Subdivision” not checked.
WORKFLOW: Retain last search	Your individual preference	<i>Note:</i> “Checked” is useful when doing a sequence of searches of the same kind.

TAB: Option	Recommended, Required, or Usual	<i>Additional Information</i>
WORKFLOW: Automatic truncation for non keyword searches	Your individual preference	
WORKFLOW: Display record directly if search results in only one title	Your individual preference	
WORKFLOW: Always create a holding when adding holdings to a bib (i.e., do not show existing holdings first)	<i>Creating IBC records: Checked</i> <i>Otherwise: Not checked</i>	
WORKFLOW: Display item record directly if item retrieve results in only one item	Your individual preference	
WORKFLOW: Sequence new items at top	<i>Recommended: Not checked</i>	<i>Reminder:</i> Put any incorrectly sequenced item records into correct order by clicking “Get Items” from the holdings record display and using “Move before” and “Move after.”
WORKFLOW: Sequence new e-items at top	[Disregard]	
WORKFLOW: Check for Duplicate Item Barcodes	<i>Required always: Checked</i>	
WORKFLOW: Suppress confirmation message upon successful save	<i>Recommended: Not checked</i>	Not suppressing confirmation messages lets you know with certainty whether your record was saved to the database and therefore reduces additional, unnecessary “save” actions “just to be sure.”

TAB: Option	Recommended, Required, or Usual	Additional Information
WORKFLOW: Update permanent location of attached items when MFHD is saved to the database	<i>Recommended: Not checked</i>	Use with caution; checking this box may result in unintentional changes to item records.
WORKFLOW: Update item type of attached items when MFHD is saved to the database (based on item location definitions)	<i>Recommended: Not checked</i>	Use with caution; checking this box may result in unintentional changes to item records.
WORKFLOW: Retain hierarchy selections	Your individual preference	
ITEM DEFAULTS: Item Type	<i>Recommended:</i> <i>Type of item most likely in your work</i>	Select the type of item you are most likely to process, depending on your work assignment.
ITEM DEFAULTS: Status	<i>Usually:</i> In Process	
ITEM DEFAULTS: Copy	<i>Recommended:</i> 0	Change number manually in item records when you know which copy you are processing.
ITEM DEFAULTS: Pieces	<i>Recommended:</i> 1	Change number manually in item records when necessary.
ITEM DEFAULTS: Self Check: Magnetic Media	<i>Recommended: Not Checked</i>	LC currently does not use
ITEM DEFAULTS: Self Check: Sensitize	<i>Recommended: Checked</i>	“Sensitize” should be checked in new item records.
ITEM DEFAULTS: <i>Other Options</i>	[Leave blank or do not change]	

TAB: Option	Recommended, Required, or Usual	<i>Additional Information</i>
FOLDERS/FILES: Templates	<p><i>Recommended:</i> Specify Hldg template: C:\Program Files(x86)\Endeavor\Voyager\Catalog\Template\Hold.tem</p> <p><i>Do not specify Bib and Auth templates</i></p>	<p>For each type of record, you can only specify one template to be used when you create a new record. That is only practical if you always use the same template for that type of record (usual for Hldg, unusual for Bib and Auth).</p>
FOLDERS/FILES: Folders	<p><i>Recommended:</i> Specify Template folder: C:\Program Files (x86)\Endeavor\Voyager\VoyagerTemplates</p> <p><i>Leave Work and Import folder options blank</i></p>	<p><i>Reminder: Generally, do not specify or use special work folders in the LC ILS; let the LC ILS use its default work folder during addition of new records or modification of existing ones. Using work folders other than the default risks accidental errors. Do not use an import folder as a work folder in the LC ILS.</i></p>
FOLDERS/FILES: Work Files	[Disregard and leave blank]	<p><i>Reminder: Do not use work files in the LC ILS.</i></p>
FOLDERS/FILES: Save to Local File	[Disregard and do not change]	
MAPPING: Expected Character Set of Imported Records/Local Import	<p><i>Default (including with Z-Processors or OCLC Serial Preprocessor):</i> MARC21 UTF-8</p> <p><i>Using Z-Client (MBRS, Music):</i> MARC21 MARC-8 (non-Unicode)</p>	<p>Switch settings to use Z-Client.</p>
MAPPING: MARC Mapping for OCR Data	[Disregard and do not change]	
COLORS/FONTS: MARC Views (variable fields): Bibliographic	Your individual preference	<i>Preset: White background</i>
COLORS/FONTS: MARC Views (variable fields): Holdings	Your individual preference	<i>Preset: Blue background</i>

TAB: Option	Recommended, Required, or Usual	<i>Additional Information</i>
COLORS/FONTS: MARC Views (variable fields): Authority	Your individual preference	<i>Preset: Yellow background</i>
COLORS/FONTS: MARC Views (variable fields): Conversion	Your individual preference	<i>Preset: Orange background</i>
COLORS/FONTS: MARC Views (variable fields): Row Marker Symbol	Your individual preference	
COLORS/FONTS: Record Hierarchy: Bibliographic	Your individual preference	<i>Preset: White background</i>
COLORS/FONTS: Record Hierarchy: Holdings	Your individual preference	<i>Preset: Blue background</i>
COLORS/FONTS: Record Hierarchy: Item	Your individual preference	<i>Preset: Green background</i>
COLORS/FONTS: Record Hierarchy: Bound With	Your individual preference	<i>Preset: Magenta background</i>
COLORS/FONTS: Font: Name	<i>Recommended: Arial Unicode MS</i>	Arial Unicode MS is the only font guaranteed to display all MARC 21 characters in UTF-8 accurately. If Arial Unicode MS is not available on your computer, use Lucida Sans Unicode.
COLORS/FONTS: Font: Size	Your individual preference	Font size can be set to any number between 8 and 72 points; use drop-down options or key in number directly.
COLORS/FONTS: Font: Bold	<i>Recommended: Not checked</i>	Setting the font to bold makes diacritics indistinct, sometimes indistinguishable.
COLORS/FONTS: Global Heading Change Hierarchy: <i>All Levels</i>	Your individual preference	

TAB: Option	Recommended, Required, or Usual	<i>Additional Information</i>
COLORS/FONTS: Search Result Colors/Suppressed Records	Your individual preference	
RDA TOOLKIT: Username/Password	Your individual preference	
BIB MARC TAG COLORS	Your individual preference	