

## Using Macro Express

### Outline/Script

rev. 8-31-2004

#### Handouts:

- Excel table of macros
- Screen shot: how to find the Excel table online
- Outline/script

#### Policies/procedures:

- The following people currently write macros, revise the Excel Macro database, and store the Macros on appropriate servers: John Doing, Claudia Horning, Jeff King. Independent cataloging centers (for ex., Law, FATA) must have the macros installed on their own servers.
- The following people install Macro Express on individual work stations: John Doing, Claudia Horning, Jeff King, Raphael Villena.
- Please send new Voyager cataloging client Macro requests to: Claudia Horning.
- All Voyager editing policies apply when using Macro Express to edit Voyager records (for ex., an individual should do only the editing which is part of his/her job, even if his/her permission allows for other types of editing; all editing which is not part of an individual's job assignment should be assigned to the appropriate person/department; etc.).
- Training is required before Macro Express can be installed on an individual's work station.

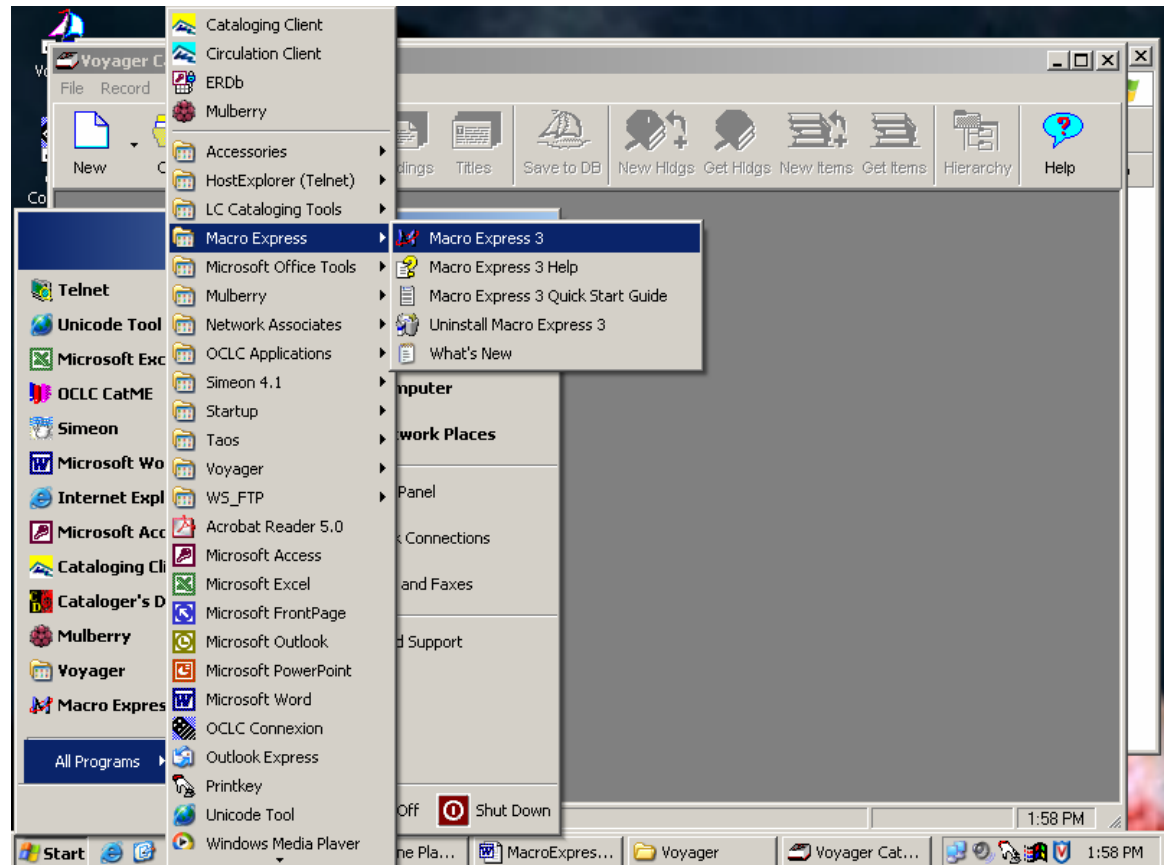
### Basic rules about using Macro Express:

- Macro Express must be launched first. It will remain active until the Macro Express session is terminated, or until an individual logs out of the network altogether.
- Always read instructions in the Excel tables very carefully. They contain important details about some of the macros.
- When using a macro, always watch carefully to assure it performs the desired function. Programming macros requires very specific details—setting a specific number of keystrokes, specific number of mouse clicks, etc. If, for ex., a cursor is not inside the specific window required by the macro, the macro will not perform as expected. Macros cannot think on their own, and need to follow the explicit instructions they have been given.
- Macros **can** be issued from:
  - Open Voyager client, where no windows have yet been opened.
  - Any open Voyager record (bibliographic, holdings, item, authority), unless otherwise instructed for a particular macro.
  - Macros **cannot** be issued from:
    - Any open Headings list or Titles list. In this case, the window must be closed before the macro can be activated.
    - Open record windows where editing has been done, but not yet saved (bibliographic, holdings, item, authority records). Edits must first be saved (or not saved).
- Any macros that involve editing either in Voyager or CatME still require that those edits be saved to database (Voyager) or otherwise, as appropriate (CatME).

# Using Macro Express

## A. Launching Macro Express

Start; All Programs; Macro Express; Macro Express 3



NOTE: The first time the installation is run, the *Macro Express 3 Quick Start Guide* may appear. Check the box in the lower left corner [“do not show this next time Macro Express runs”]; close Quick start guide.

An “M” now appears in the lower right corner of the screen. This means that Macro Express has been launched.

To terminate Macro Express,

--right click on the “M” icon; click on “Terminate Macro Express” OR

--log out of the network.

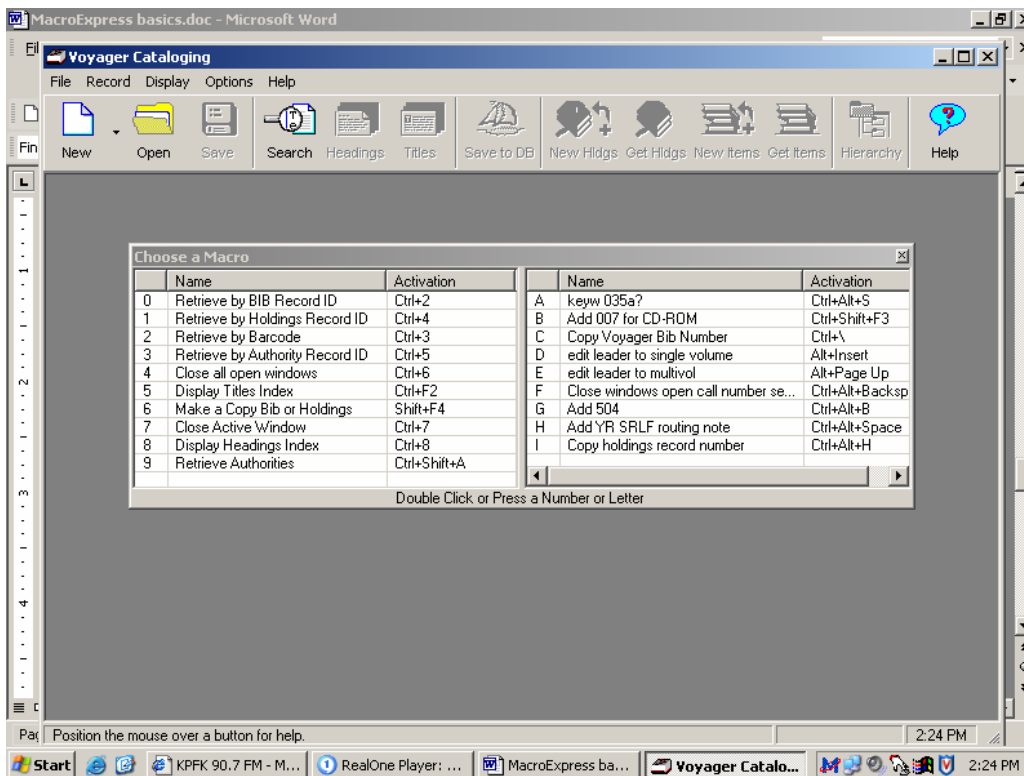
## B. Log into Voyager and/or OCLC CatME

### C. To see a list of available macros,

1. Open up the Excel spreadsheet OR
2. Go into Voyager:

**[ctrl] + [alt] + [shift] + [z]**

- Highlight any macro in the list
- Double click on highlighted item to activate it OR
- Type letter or number in front of macro to activate it



### D. To use macros,

1. Follow instructions above OR
2. Type the individual keystroke required to issue a macro, keeping in mind details that may apply (for ex., which window needs to be open, etc.)

## E. Common macros and how to use them

1. **Catalog / Copies Voyager holdings record ID number for pasting anywhere** (e.g., for re-linking items, or to report a problem)
  - a. Must be in Voyager Holdings record
  - b. Holdings record must be maximized (NOTE: can set General preferences to maximize all open windows)
  - c. Copy the number: [ctrl] + [alt] + [h]
  - d. Window opens: “the holdings record number has been copied”
  - e. Click [OK]
  - f. “M” icon on lower right of screen changes to running man
  - g. Paste the number: place cursor in desired location, type [h] (NOTE: can *not* use [ctrl] + [v] or Edit > Paste)
  - h. Running man changes back to “M”
2. **Catalog / Copies Voyager bibliographic record ID number for pasting anywhere**
  - a. Must be in Voyager Bibliographic record
  - b. Bibliographic record must be maximized
  - c. Copy the number: [ctrl] + [l]
  - d. Window opens: “the bib record number has been copied”
  - e. Click [OK]
  - f. “M” icon on lower right of screen changes to running man
  - g. Paste the number: place cursor in desired location, type [b]
  - h. Running man changes back to “M”
3. **Var / Copies CatME record number to Voyager 035**
  - a. Appropriate bibliographic records must be open in CatME and Voyager
  - b. Begin in CatME
  - c. [ctrl] + [backspace] to issue this macro
  - d. After Macro switches to Voyager, must click somewhere in the bibliographic record (NOTE: it does not matter where)

4. **Var / Copies CatME record number to Voyager 035 and copies Voyager bibliographic record ID number to OCLC 949**
  - a. Appropriate bibliographic records must be open in CatME and Voyager
  - b. Begin in CatME
  - c. [ctrl] + [F8]
  - d. After Macro switches to Voyager, must click somewhere in the bibliographic record
  - e. A box comes up; choose "Replace OCLC number" OR "add 035 and OCLC number," as appropriate. Click on [OK]
  - f. Voyager record must still be saved to database
  - g. CatME record must still be updated, etc.
5. **Catalog / Add SRLF routing note for YRL**
  - a. Must be in Voyager holdings record
  - b. Cursor must be exactly where note will be inserted (e.g., at end of 852 field, in correct position in 866 field, etc.)
  - c. [ctrl] + [alt] + [space bar]
6. **Catalog / Close active windows and open call number search**
  - a. Can be anywhere in Voyager cataloging client (with exceptions noted at the beginning of this document)
  - b. [ctrl] + [alt] + [backspace]