



Item Templates in Cataloging: Creation, Use, and Sharing in Evergreen

Since catalogers generally need to apply the same attributes to the same categories of items, Evergreen supplies templates for the **Item Attribute Editor/Copy Editor**. Templates help speed copy cataloging and minimize errors on copy records by giving catalogers the ability to apply the same set of attributes to different copies without manually editing each one. Templates are applied in the **Copy Editor** under **Holdings Maintenance**. They can be created, deleted or edited in either **Edit Item attributes** under **Holdings Maintenance** or in the **Admin – Local Administration** menu.

Templates are tied to a login so they are available on any workstation or laptop that login uses to catalog. They are found in the drop down menu at the head of the edit item interface:

The screenshot shows the 'Record Summary' section with the following details: Title: Stars in my pocket like grains of sand; Author: Delany, Samuel R.; TCN: (OCoLC) [ocm11685942](#); Edition: ; Created By: (PINES) [1010101010101](#); Last Edited By: (STATEL). Below this is the 'Copy Editor' section, which includes a 'Templates:' dropdown menu currently set to 'AA stacks', and buttons for 'Apply', 'Delete', 'Import', 'Export', and 'Save'.

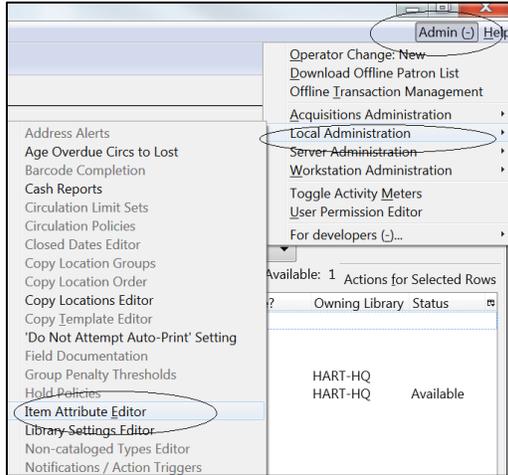
If no templates have been created for a login, there will be no drop down box:

The screenshot shows the 'Copy Editor' section where the 'Templates:' dropdown menu is absent. Instead, there are buttons for 'Apply', 'Delete', 'Import', 'Export', and 'Save'. Below these buttons is the 'Identification' section, which includes buttons for 'Location (1)', 'Circulation (2)', 'Miscellaneous (3)', and 'Sta'.

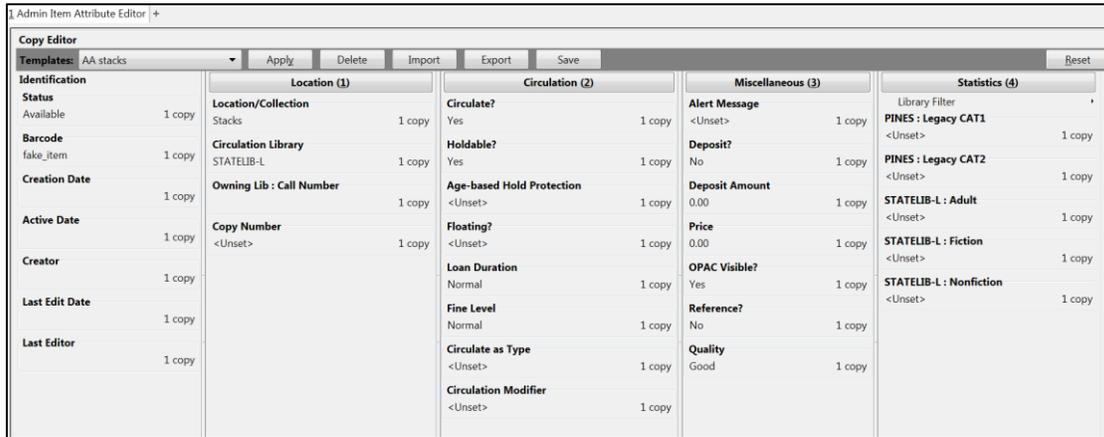


Creating templates

You can create a template for the item attribute interface in **Admin → Local Administration → Item Attribute Editor**.



The edit item interface opens:



You can also create templates directly in the **Copy Editor** while editing attributes. Select a copy/item record while in **Actions for This Record → Holdings Maintenance**. Then from the **Actions for selected Rows** menu, select **Edit Items**.

All templates for your login will be viewable from either place. You can add new, edit existing, or delete existing, and import and export templates.



To create a template, select and apply values for each attribute needed in the template. Once applied, attributes will be highlighted in green. Once done, click on the “save” button at the template line:

The screenshot shows the 'Copy Editor' interface with the following attributes and values:

Attribute	Value	Quantity
Barcode	1234567890	1 copy
Creation Date		1 copy
Creator		1 copy
Last Edit Date		1 copy
Last Editor		1 copy
Shelving Location	Stacks	1 copy
Circulation Library	STATELIB-L	1 copy
Owning Lib : Call Number	STATELIB-L: TEST	1 copy
Copy Number	<Unset>	1 copy
Circulate?	Yes	1 copy
Holdable?	Yes	1 copy
Age Protection	<Unset>	1 copy
Loan Duration	Normal	1 copy
Fine Level	Normal	1 copy
Circulate as Type	<Unset>	1 copy
Circulation Modifier	microform	1 copy
Alert Message	<Unset>	1 copy
Deposit?	No	1 copy
Deposit Amount	0.00	1 copy
Price	100.00	1 copy
OPAC Visible?	Yes	1 copy
Reference?	No	1 copy

You will be prompted to name your template. Choose a name that describes what the template does (Young Adult, Gardening Collection, Reference, for examples):

The dialog box prompts the user to enter a template name. The input field contains the text "Microform".

Your newly created template will be in the drop down menu when you next return to the copy editor screen:

The screenshot shows the 'Copy Editor' interface with the 'Templates' dropdown menu open. The menu items are:

- AA stacks
- AJC Microfilm
- Correcting old records
- DVD-LONG
- DVD-Long
- Damaged
- GLASS Stacks
- Microform
- Nonfiction
- Office
- Stacks 2

The 'Microform' option is highlighted in blue.



Applying templates

Once you have created your templates, you can apply them to any copy on any title record. From the **Copy Editor** screen, choose the desired template from the drop down menu and click on **Apply** (ALT + Y).

The screenshot shows the 'Copy Editor' interface. At the top, it displays 'Author: Delaney, Samuel R.', 'TCN: (OCoLC) ocm11685942', 'Created By: (PINES) 1010101010101', and 'Edition: Last Edited By: (STATELIB-L) 21099000002'. Below this, the 'Copy Editor' section has a 'Templates:' dropdown menu with 'AA stacks' selected, and an 'Apply' button. Other buttons include 'Delete', 'Import', 'Export', and 'Save'. The main area is divided into sections: 'Identification' (Barcode: test1, 1 copy), 'Location (1)' (Shelving Location: Stacks, 5 copies), and 'Circulation (2)' (Circulate?: Yes, 5 copies).

The fields edited by that template will be highlighted in green:

This screenshot shows the 'Copies' record summary for the title 'Stars in my pocket like grains of sand' by Samuel R. Delaney. The 'Copy Editor' section shows the 'AA stacks' template applied. The fields edited by the template are highlighted in green: 'Shelving Location' (Stacks), 'Circulation Library' (STATELIB-L), 'Owning Lib - Call Number' (STATELIB-L: F DELANEY), 'Copy Number' (<Unset>), 'Circulation Modifier' (book), 'Alert Message' (<Unset>), 'Deposit?' (No), 'Deposit Amount' (0.00), 'Price' (0.00), 'OPAC Visible?' (Yes), 'Reference?' (No), 'STATELIB-L: Adult' (Adult), and 'STATELIB-L: Nonfiction' (Nonfiction). The 'Statistics (4)' section shows the library filter 'STATELIB-L: Nonfiction' with 5 copies.

You can apply more than one template to an item if needed. For example, if you have an item in your library's nonfiction collection that contains a CD-ROM in the back of a book, you can have a template for the collection and one for the alert message.

Once you have applied your templates, make any additional changes to the attributes (price, for example) and then click on **Create Copies** (ALT + M).



Editing templates

You can edit existing templates to add or change an attribute. If in the Edit Item interface with a copy, apply the template to a copy. If in the **Item Attribute Editor**, just choose the correct template. In this example below, we want to edit **Age Protection** in the template “Main template” from 6month to 3month:

The screenshot shows the 'Copy Editor' interface with the 'Age Protection' attribute set to '6month'. The interface is divided into several sections: Identification, Location (1), Circulation (2), Miscellaneous (3), and Statistics (4). The 'Age Protection' attribute is highlighted in green.

Section	Attribute	Value	Count
Identification	Status	Available	1 copy
	Barcode	50723010015200	1 copy
	Creation Date	1996-04-22	1 copy
	Creator	admin	1 copy
	Last Edit Date	2008-01-02	1 copy
Location (1)	Shelving Location	STACKS	1 copy
	Circulation Library	STATELIB-L	1 copy
Circulation (2)	Age Protection	6month	1 copy
	Loan Duration	Normal	1 copy
Miscellaneous (3)	Alert Message	<Unset>	1 copy
	Deposit?	No	1 copy
Statistics (4)	Library Filter	PINES : Legacy CAT1	1 copy
		PINES : Legacy CAT2	1 copy
	STATELIB-L : Adult	Adult	1 copy
	STATELIB-L : Fiction	<Unset>	1 copy

Make the necessary changes ((be sure to click on **Apply**):

The screenshot shows the 'Copy Editor' interface with the 'Age Protection' attribute set to '3month'. The interface is divided into several sections: Identification, Location (1), Circulation (2), Miscellaneous (3), and Statistics (4). The 'Age Protection' attribute is highlighted in green.

Section	Attribute	Value	Count
Identification	Status	Available	1 copy
	Barcode	50723010015200	1 copy
	Creation Date	1996-04-22	1 copy
	Creator	admin	1 copy
	Last Edit Date	2008-01-02	1 copy
Location (1)	Shelving Location	STACKS	1 copy
	Circulation Library	STATELIB-L	1 copy
Circulation (2)	Age Protection	3month	1 copy
	Loan Duration	Normal	1 copy
Miscellaneous (3)	Alert Message	<Unset>	1 copy
	Deposit?	No	1 copy
Statistics (4)	Library Filter	PINES : Legacy CAT1	1 copy
		PINES : Legacy CAT2	1 copy
	STATELIB-L : Adult	Adult	1 copy
	STATELIB-L : Fiction	<Unset>	1 copy



Click on **Save**, and when prompted to name the template, use the exact same name (names are case sensitive) as the existing template:



The next time you apply the template, the changes you made will be applied:



Using an existing template to create a new template

If you need to create a new template that has common elements with an existing template, you can use the existing template as a base. First, apply the template, and then make the changes necessary for the new template. **Save** it, and when prompted for a name, create a new name, specific to that template.

Sharing templates

Rather than creating new templates from scratch for each login for your library or vendor, you can export the template file, save it to a file on your computer to easily



email it, or save it to an external device to transfer it. To export the template file to another user, from the **Item Attribute Editor/Copy Editor**, click on the **Export** button:



You will be prompted with a dialog box to choose where to save the file and for a name. Pick the location you need and a name that is distinctive.

To import the file to another station/login, go to the **Item Attribute Editor/Copy Editor** for that station/login. Click on the **Import** button:



Locate the file and click on **Open**. The file will be imported to the workstation/login.

Note: some users have reported difficulty importing large files. If you encounter difficulties, you may need to break the large file into smaller pieces and import each one separately.

Other template functions

Deleting

You can delete a template. Choose the template to be deleted from the drop down box. Then click on **Delete**.

Changing template names

You can change the name of an existing template. Choose the template from the drop down box and click on save. Assign the template a new name. You will then need to delete the template with the old name.