



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:

Record Summary
Title: Stars in my pocket like grains of sand
Author: Delany, Samuel R.
TCN: (OCoLC) [ocm11685942](#) Created By: (PINES) [1010101010101](#) Edition: Last Edited By: (STATEL)
Copy Editor
Templates: AA stacks [v] [Apply] [Delete] [Import] [Export] [Save]

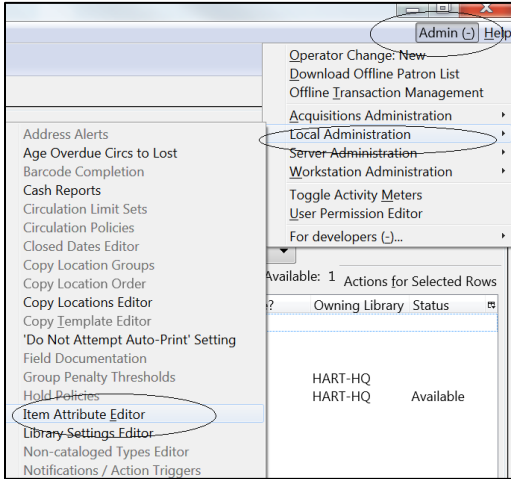
If no templates have been created for a login, there will be no drop down box:

Copy Editor
Templates: [Apply] [Delete] [Import] [Export] [Save]
Identification [Location (1)] [Circulation (2)] [Miscellaneous (3)] [Sta]

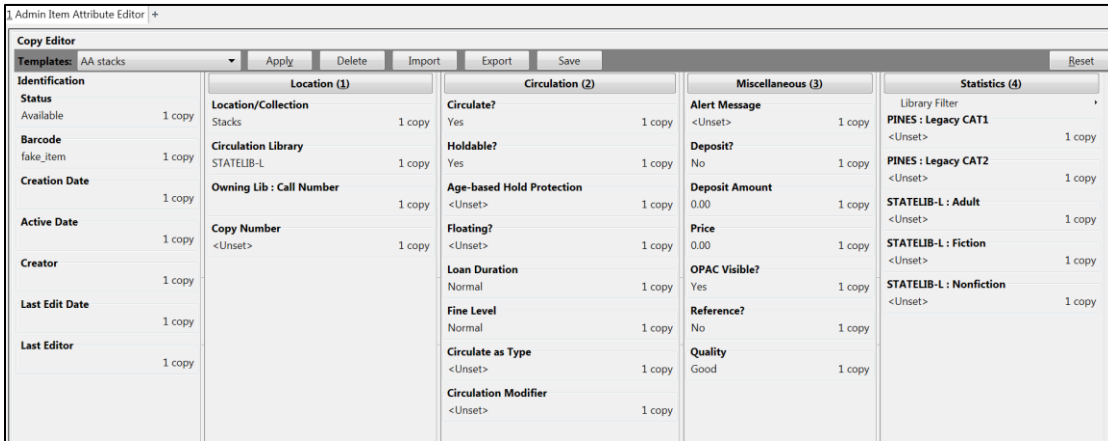


Creating templates

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 a dropdown menu open. The menu items are: AA stacks, AJC Microfilm, Correcting old records, DVD-LONG, DVD-Long, Damaged, GLASS Stacks, Microform (highlighted in blue), Nonfiction, Office, and Stacks 2.



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' window with a 'Record Summary' for the title 'Stars in my pocket like grains of sand' by Samuel R. Delaney. It includes the same 'Copy Editor' interface as the previous screenshot. The 'Apply' button is highlighted, and the 'AA stacks' template is selected. 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 on the right shows library filters like 'PINES: Legacy CAT1', 'PINES: Legacy CAT2', 'STATELIB-L: Adult', 'STATELIB-L: Fiction', and 'STATELIB-L: Nonfiction', each with a count of 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:

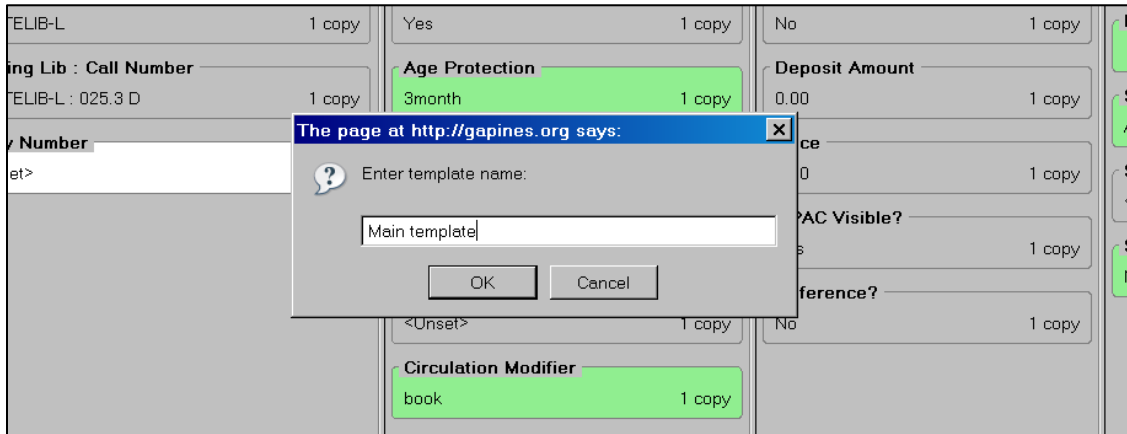
The screenshot shows the 'Item Attribute Editor' window for a 'Main template'. The interface is divided into several columns: Identification, Location (1), Circulation (2), Miscellaneous (3), and Statistics (4). The 'Age Protection' attribute in the Circulation (2) column is currently set to '6month'. Other attributes include 'Circulate?' (Yes), 'Holdable?' (Yes), 'Loan Duration' (Normal), 'Fine Level' (Normal), 'Circulate as Type' (<Unset>), and 'Circulation Modifier' (book). The 'Statistics (4)' column shows various library filters and categories like 'PINES : Legacy CAT1', 'PINES : Legacy CAT2', 'STATELIB-L : Adult', 'STATELIB-L : Fiction', and 'STATELIB-L : Nonfiction'.

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

This screenshot shows the same 'Item Attribute Editor' window, but the 'Age Protection' attribute in the Circulation (2) column has been updated to '3month'. The 'Apply' button is highlighted, indicating the change has been saved. All other attributes and the overall layout remain the same as in the previous screenshot.



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

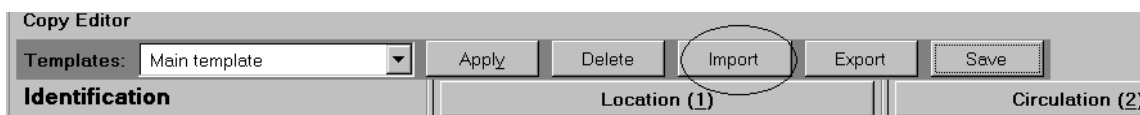


email it, or save it to an external device to transfer it. To export the template file to another user, from the **Item Attribute Editor/Copy Editor**, click on the **Export** button:



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.