



## 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]

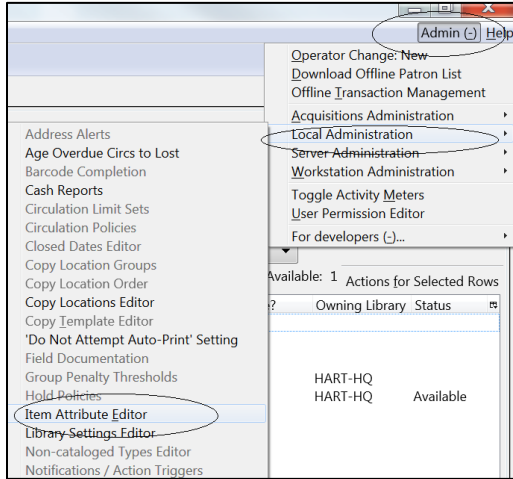
If no templates have been created for a login, there will be no drop down box:

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

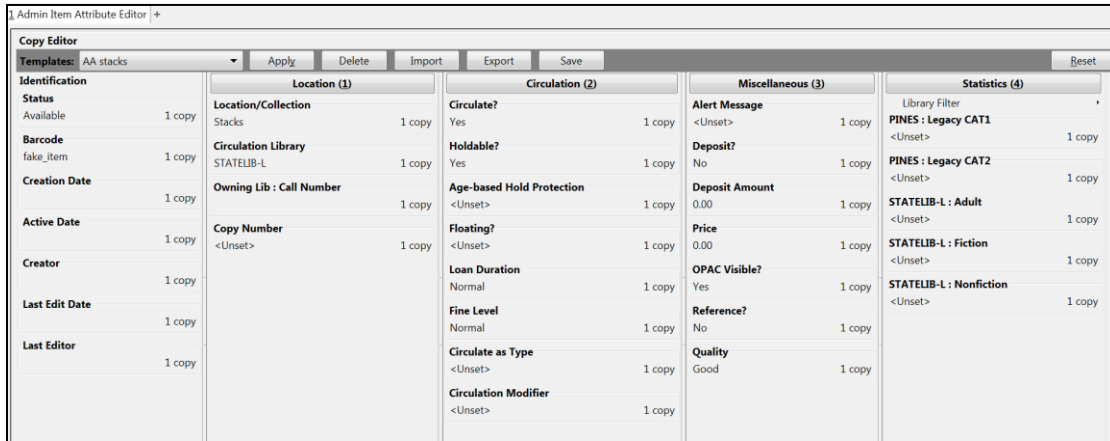


## Creating templates

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:

Templates:	Apply	Delete	Import	Export	Save																
<b>Identification</b>	<b>Location (1)</b>		<b>Circulation (2)</b>		<b>Miscellaneous (3)</b>																
Barcode 1234567890 1 copy	Shelving Location Stacks 1 copy	Circulate? Yes 1 copy	Alert Message <Unset> 1 copy	Creation Date 1 copy	Circulation Library STATELIB-L 1 copy	Holdable? Yes 1 copy	Deposit? No 1 copy	Creator 1 copy	Owning Lib : Call Number STATELIB-L: TEST 1 copy	Age Protection <Unset> 1 copy	Deposit Amount 0.00 1 copy	Last Edit Date 1 copy	Copy Number <Unset> 1 copy	Loan Duration Normal 1 copy	Price 100.00 1 copy	Last Editor 1 copy	Fine Level Normal 1 copy	OPAC Visible? Yes 1 copy	Reference? No 1 copy	Circulate as Type <Unset> 1 copy	Circulation Modifier microform 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):

Enter template name:  
Microform  
OK Cancel

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

Templates: TEST 3  
Apply

- AA stacks
- AJC Microfilm
- Correcting old records
- DVD-LONG
- DVD-Long
- Damaged
- GLASS Stacks
- Microform**
- Nonfiction
- Office
- 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) 210990000002'. 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.

Identification	Location (1)	Circulation (2)	Miscellaneous (3)	Statistics (4)
Status: Available 1 copy	Shelving Location: STACKS 1 copy	Circulate?: Yes 1 copy	Alert Message: <Unset> 1 copy	Library Filter: PINES : Legacy CAT1 1 copy
Barcode: 50723010015200 1 copy	Circulation Library: STATELIB-L 1 copy	Holdable?: Yes 1 copy	Deposit?: No 1 copy	PINES : Legacy CAT2 1 copy
Creation Date: 1996-04-22 1 copy	Owning Lib : Call Number: STATELIB-L : 025.3 D 1 copy	Age Protection: 6month 1 copy	Deposit Amount: 0.00 1 copy	STATELIB-L : Adult 1 copy
Creator: admin 1 copy	Copy Number: <Unset> 1 copy	Loan Duration: Normal 1 copy	Price: 0.00 1 copy	STATELIB-L : Fiction <Unset> 1 copy
Last Edit Date: 2008-01-02 1 copy		Fine Level: Normal 1 copy	OPAC Visible?: Yes 1 copy	STATELIB-L : Nonfiction 1 copy
Last Editor: elainehardy 1 copy		Circulate as Type: <Unset> 1 copy	Reference?: No 1 copy	
		Circulation Modifier: book 1 copy		

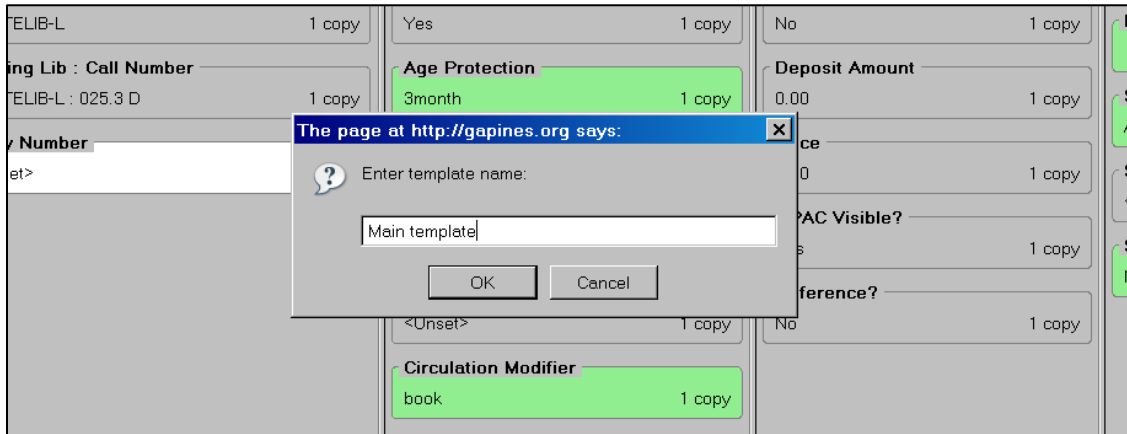
Make the necessary changes ((be sure to click on **Apply**):

The screenshot shows the 'Copy Editor' interface with the 'Age Protection' attribute changed 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.

Identification	Location (1)	Circulation (2)	Miscellaneous (3)	Statistics (4)
Status: Available 1 copy	Shelving Location: STACKS 1 copy	Circulate?: Yes 1 copy	Alert Message: <Unset> 1 copy	Library Filter: PINES : Legacy CAT1 1 copy
Barcode: 50723010015200 1 copy	Circulation Library: STATELIB-L 1 copy	Holdable?: Yes 1 copy	Deposit?: No 1 copy	PINES : Legacy CAT2 1 copy
Creation Date: 1996-04-22 1 copy	Owning Lib : Call Number: STATELIB-L : 025.3 D 1 copy	Age Protection: 3month 1 copy	Deposit Amount: 0.00 1 copy	STATELIB-L : Adult 1 copy
Creator: admin 1 copy	Copy Number: <Unset> 1 copy	Loan Duration: Normal 1 copy	Price: 0.00 1 copy	STATELIB-L : Fiction <Unset> 1 copy
Last Edit Date: 2008-01-02 1 copy		Fine Level: Normal 1 copy	OPAC Visible?: Yes 1 copy	STATELIB-L : Nonfiction 1 copy
Last Editor: elainehardy 1 copy		Circulate as Type: <Unset> 1 copy	Reference?: No 1 copy	
		Circulation Modifier: book 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.