Item templates

Since catalogers generally need to apply the same attributes to the same categories of items, Evergreen supplies templates for the Holdings 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 Holdings Editor under Holdings view – Add Volumes or holdings view – Actions menu – Add or Edit copies. They can be created, deleted or edited in those places under the Copy Templates tab or in the Holdings Template Editor under Administration – Local Administration.

Creating and editing templates

Templates are tied to a login so they are available on any workstation or laptop that login uses to catalog. They can be found in a dropdown box in Administration – Local Administration – Holdings Template Editor or in the Copy Templates tab when adding or editing copies in Holdings View. If no templates have been created for a login, there will be nothing in the drop down box.

Creating Templates

To create a template, type a name in the data well beside template (any template containing the phrase you type will appear in a dropdown menu), choose your attributes, and click on the save button. Attributes you have selected will highlight in green.

Default values

You do not need to provide default values for several attributes, unless your values differ from the default:

- Circulate?: Yes/True
- Status: In process
- Reference?: No/False
- OPAC Visible?: Yes/True
- Holdable?: Yes/True
- Quality: Good (PINES has not implemented)
- Copy status: in process
- Circulation Library (Populates from workstation library, will need to change if Templates is for specific branch. If used for adding multiple volumes for different branches/libraries leave the value in editor (Unset) so that the Circ library will populate from owning library for each branch/library)
- Fine level: normal
- Duration: normal

Your newly created template will be immediately added to the dropdown menu in the item template editor and the volume/copy editor.

> ⚠️ It is best practice to export and save a backup copy of your current templates as a precaution.

Editing templates

You can edit existing templates to add or change an attribute in either the Volume/Copy Template Editor in Local Administration or in the Volume/Copy Editor. Select the template to be edited from the dropdown menu, click Apply, make the necessary changes, and click on Save.

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, change the name, and then make the changes necessary for the new template. Then Save it.

Sharing/exporting 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 your computer to easily email it, or save it to an external device to transfer it. Exporting also allows you to save a backup copy of your current templates as a precaution. First, in your browser, make sure your settings to download files is set to always ask for a file location.
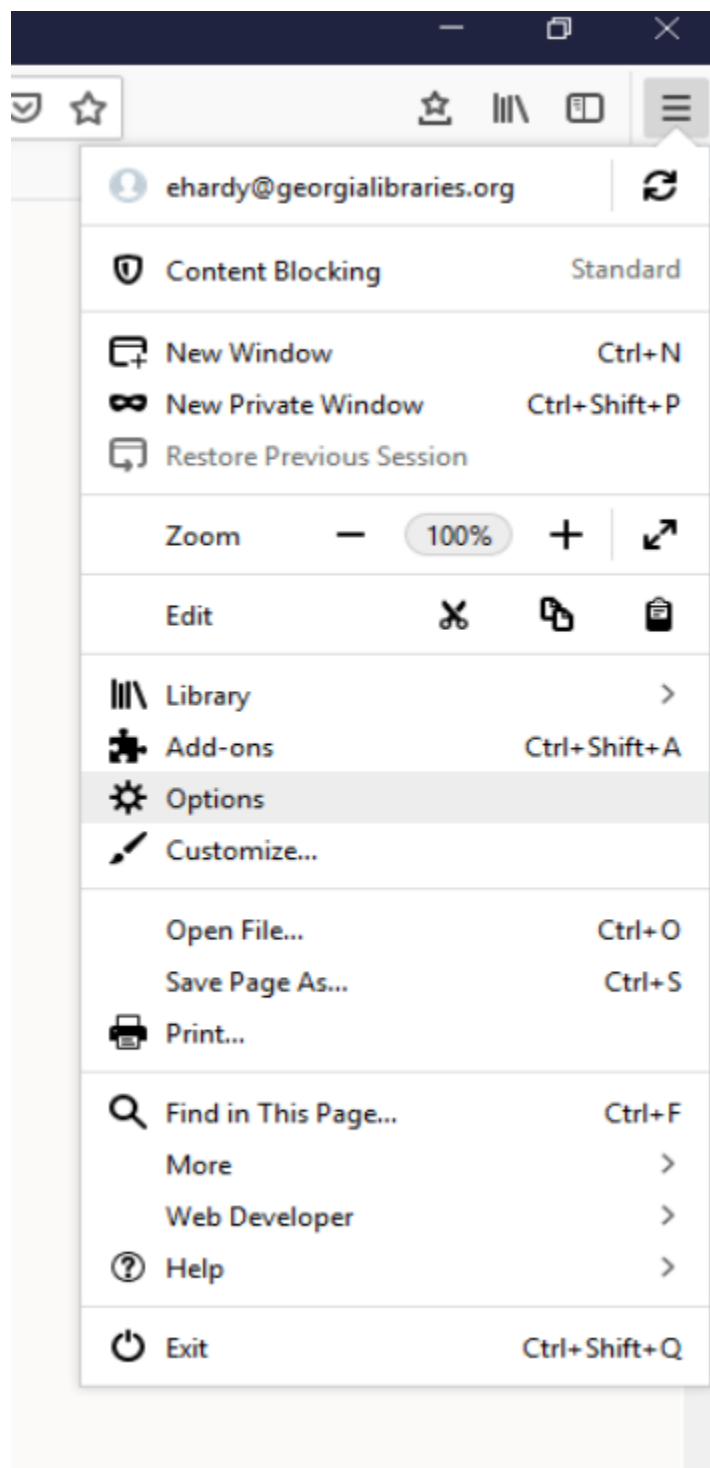
In Chrome, at the three dots menu, select settings:
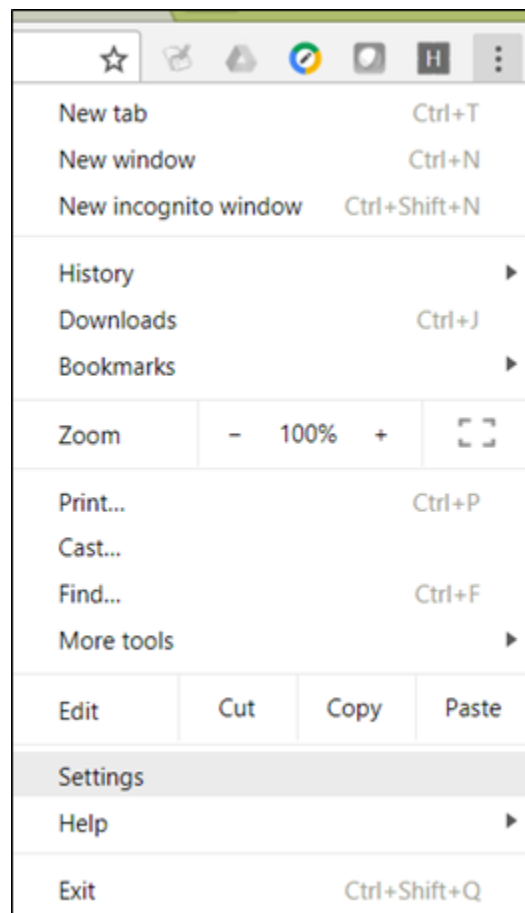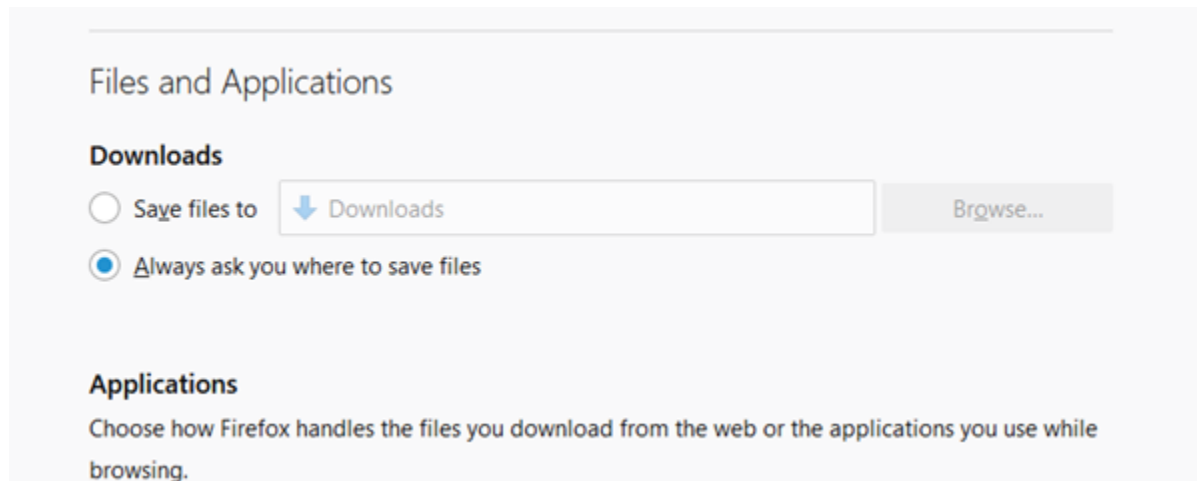

Scroll down and click on Advanced, the scroll down again to Downloads:
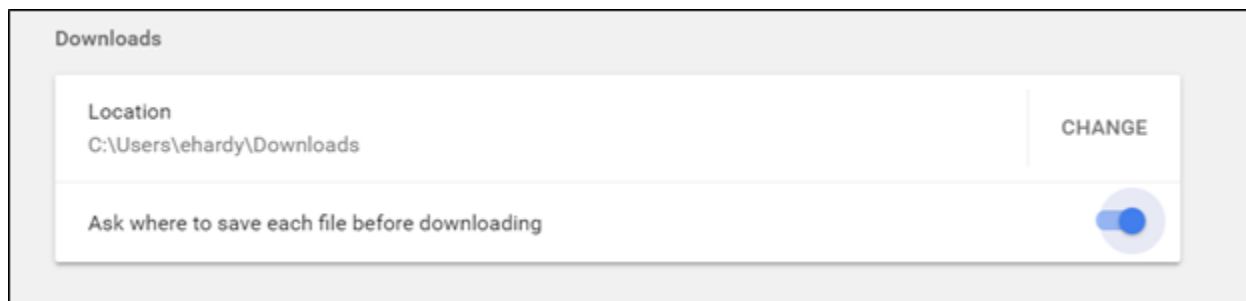
In Firefox, at the "hamburger" menu, select options:

Scroll down to Files and Applications and make sure "Always ask you where to save files" is chosen:

You should be prompted to choose a location when exporting file.

From either the Holdings Template Editor either in Local Administration or from the templates file in the Holdings 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 workstation/login, go to the Holdings Template Editor either in Local Administration or from the templates file in the Holdings editor for the workstation/login. Click on the **Import** button. Locate the file and click on **Open**. The file will be imported to the workstation/login. The file will overlay all templates with the same name and add additional ones with different names for the target login.

Deleting templates

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, Apply it, give it a new name, and click on Save. You will then need to delete the template with the old name.