

Chapter 6 -- Item Templates

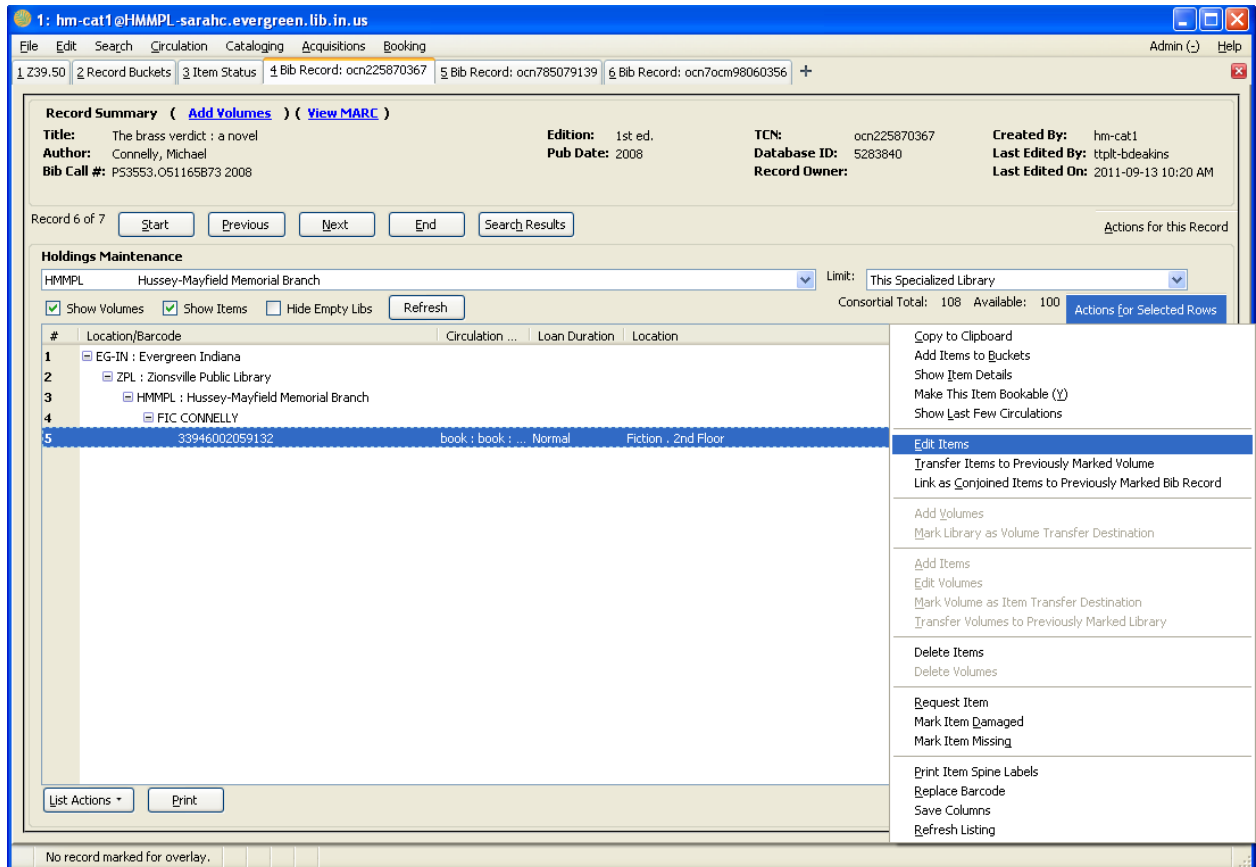
Creating Item Templates

Item templates are used to apply item information to your holdings. Since you will generally apply the same information over and over to items of the same type, you can make a template to apply the information to an item or items all at once, instead of applying this information into each field individually every time.

Creating item templates is done from the Copy Editor. You can do this when adding holdings or using the Edit Items function. It may be helpful to read **Chapter 7 –Using the Copy Editor** before creating your templates.

Item templates belong to the log-in ID, so users with other log-in IDs will not see your templates.

Open any bibliographic record where you have holdings in the Holdings Maintenance view. Highlight the item line and click on **Actions for Selected Rows (Alt + F)** or right click and select **Edit Items (Alt + E)**

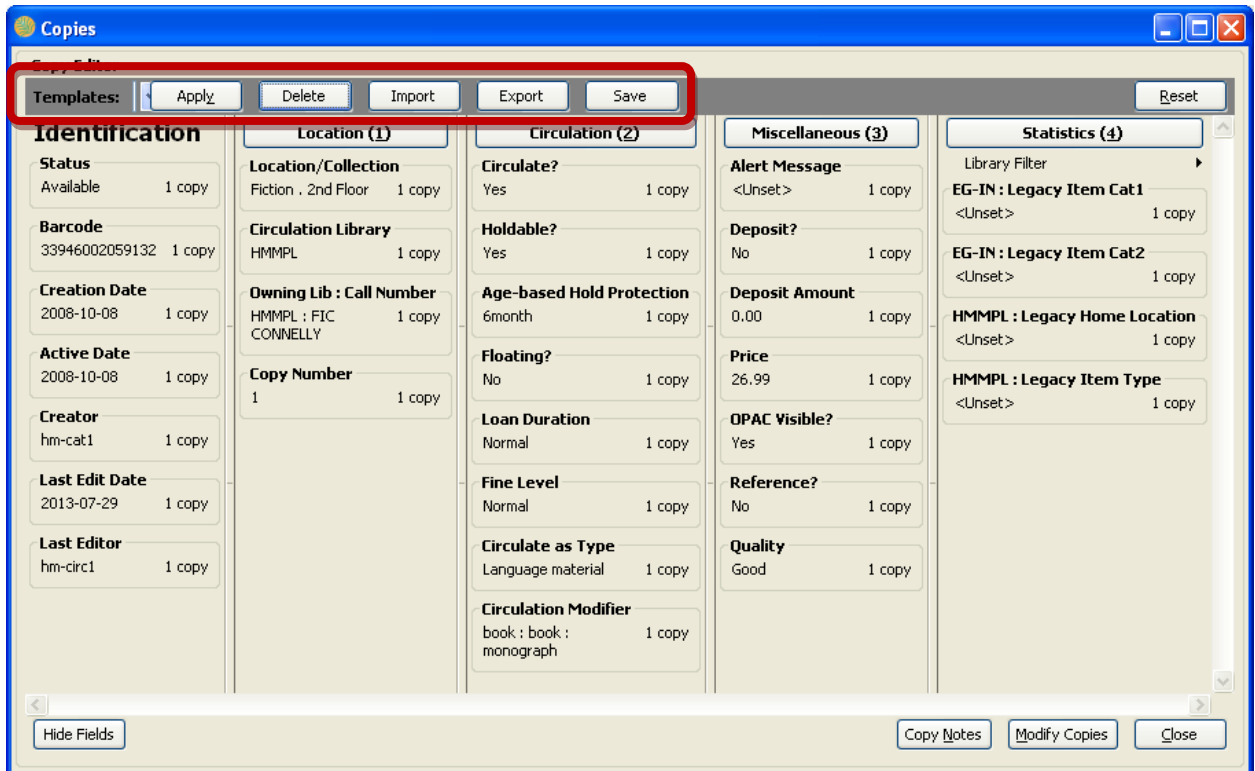


Evergreen Indiana Cataloging Training Manual

Chapter 6 – Templates

TIP: You could also open a record where you wish to add holdings and proceed with the steps in Chapter 5 – Adding Holdings until the Copy Editor opens.

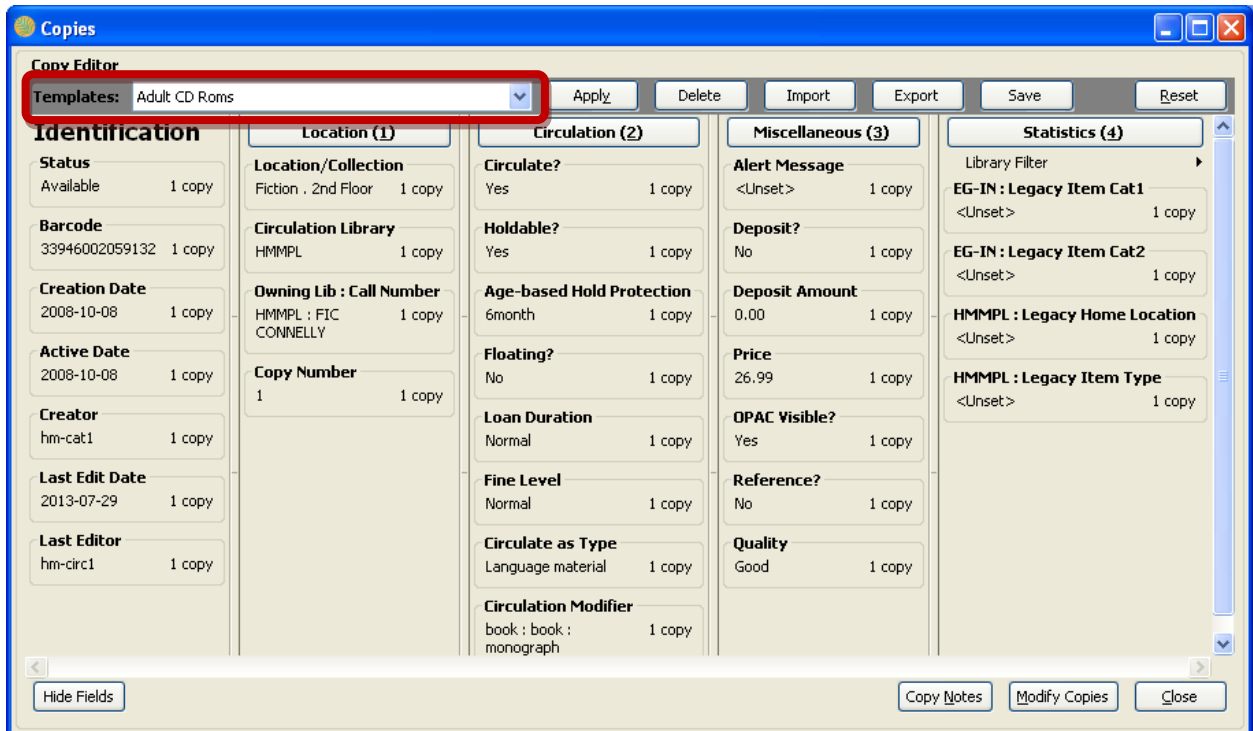
The Copy Editor will open. If no templates have been created for your log-in, none will display in the gray Templates bar in the Copy Editor. You will see the word “Templates:” with a row of buttons, as seen below.



Evergreen Indiana Cataloging Training Manual

Chapter 6 – Templates

After you have added Templates, a dropdown box with template names appears will appear in the Templates bar, as seen below:



The screenshot shows the 'Copies' window with the 'Copy Editor' tab active. A red box highlights the 'Templates' dropdown menu, which currently displays 'Adult CD Roms'. Below the dropdown are buttons for 'Apply', 'Delete', 'Import', 'Export', 'Save', and 'Reset'. The main area is divided into five columns: Identification, Location (1), Circulation (2), Miscellaneous (3), and Statistics (4). Each column contains various fields with their current values and a '1 copy' indicator. At the bottom, there are buttons for 'Hide Fields', 'Copy Notes', 'Modify Copies', and 'Close'.

Identification	Location (1)	Circulation (2)	Miscellaneous (3)	Statistics (4)
Status Available 1 copy	Location/Collection Fiction . 2nd Floor 1 copy	Circulate? Yes 1 copy	Alert Message <Unset> 1 copy	Library Filter EG-IN : Legacy Item Cat1 <Unset> 1 copy
Barcode 33946002059132 1 copy	Circulation Library HMMPL 1 copy	Holdable? Yes 1 copy	Deposit? No 1 copy	EG-IN : Legacy Item Cat2 <Unset> 1 copy
Creation Date 2008-10-08 1 copy	Owning Lib : Call Number HMMPL : FIC CONNELLY 1 copy	Age-based Hold Protection 6month 1 copy	Deposit Amount 0.00 1 copy	HMMPL : Legacy Home Location <Unset> 1 copy
Active Date 2008-10-08 1 copy	Copy Number 1 1 copy	Floating? No 1 copy	Price 26.99 1 copy	HMMPL : Legacy Item Type <Unset> 1 copy
Creator hm-cat1 1 copy		Loan Duration Normal 1 copy	OPAC Visible? Yes 1 copy	
Last Edit Date 2013-07-29 1 copy		Fine Level Normal 1 copy	Reference? No 1 copy	
Last Editor hm-circ1 1 copy		Circulate as Type Language material 1 copy	Quality Good 1 copy	
		Circulation Modifier book : book : monograph 1 copy		

To create a template, you will set each desired field individually for your item, and then save those settings as a template.

TIP: When creating templates only enter field information that you will need every time for that type of item. Otherwise, you will have to change that field whenever the information is not applicable.

To navigate between the various boxes in the Copy Editor, click on the field you wish to edit to activate it.

For further information about using the Copy Editor, see **Chapter 7 – Using the Copy Editor, Changes and Copy Notes**

Copy Editor Fields

Identification Column

Most of the items in the identification column are set to default values and cannot be edited. Only **Status** can be changed from the Copy Editor.



The screenshot shows the 'Identification' section of the Copy Editor. The 'Status' field is a dropdown menu currently set to 'Available'. The dropdown list is open, showing various status options. Some options are greyed out, indicating they are not available for selection in this context. The options listed are: Available (selected), Bindery, Cataloging, Checked out, Claimed Returned, Contact library, Damaged, Discard/Weed, ILL, In process, In transit, Long Overdue, Lost, Mending, Missing, On holds shelf, On order, On reservation shelf, Reference, Reorder, Reserves, Reshelving, and Temporarily Unavailable.



The screenshot shows the 'Identification' section of the Copy Editor with several fields. Each field has a label and a value, with '1 copy' indicated next to the value. The fields are: Status (Checked out), Barcode (33946002059066), Creation Date (2008-10-08), Creator (hm-cat1), Last Edit Date (2008-11-20), and Last Editor (SELF).

Some of the options in the status list require circulation actions and cannot be applied from the copy editor. These are greyed out in the drop down list.

If your materials are preprocessed and you would like them to be available for check out immediately after cataloging, you can set the Status in your item templates to Available.

If you set your items to a status of In process, they will need to be made available for circulation. This can be done by checking them in.

Setting a status of Reference for Reference materials is optional, since the circulation modifier will prevent them from circulating.

NOTE: *If you set the status as Reference and the item gets checked in, the status will change to Reshelving and then Available.*

Location Column

Location (1)	
Shelving Location	
Audio Books . 2nd Floor	1 copy
Circulation Library	
HMMPL	1 copy
Owning Lib : Call Number	
HMMPL : FIC CONNELLY	1 copy
Copy Number	
1	1 copy

First, set the **Shelving location**. Select the location from the drop down list, and click **Apply** or type **Alt + A**. If you do not click apply, even though it appears in the box, it will not be applied to your item.

NOTE: The Shelving locations belong to a specific organizational unit. They can belong to the consortium, a library system, or a library branch. You can tell who owns the shelving location by the code before the colon. The default shelving location is Stacks, and belongs to the consortium (EG-IN, which is highlighted below. The other shelving locations seen below are assigned at the branch level. They belong to HMMPL. Shelving locations can also belong to systems, in this case the system would be ZPL. If your library has multiple

branches, and the shelving locations are owned by the branches and not the system, you will need to create separate templates for each branch. Including the branch name as part of the template name will help prevent you from applying the templates to the wrong branch.

EG-IN : Stacks
EG-IN : Stacks
HMMPL : Audio Books . 2nd Floor
HMMPL : Audio Visual - 1st Floor
HMMPL : Beginning Chapter Books - 1st Floor
HMMPL : Biographies . End of Nonfiction section . 2nd Floor

Circulation Library is automatically set to the library branch you chose when you are adding the volume or to your branch, if you are using fast item add. It can be changed to a different branch if needed.

Owning Lib : Call Number is set to the library branch and call number you assigned in the Volume Editor. You can change the Owning library if desired, but the Call Number cannot be changed from the copy editor. See **Chapter 8 – Changing Call Numbers**, if needed.

TIP: In most cases you would not need to set Circulation or Owning Library while creating a template, since these are set by default when you create your items. However, if your library has branches, you might find this feature useful to create a template to change items from one branch to another. If you have branch specific templates, you could also set these as an easy way to double check that you've applied the correct template.

You may apply a **Copy Number**, if desired. This will apply the number you set to all copies. It will not enumerate the items.

Circulation Column

The default selection for **Circulate?** and **Holdable?** is Yes. If you wish to change either to No, you may set that now, for instance for reference materials.

Set the **Age Protection** to 6 months, according to Evergreen Indiana circulation policy.

NOTE: *Age Protection is not necessary for non-circulating materials, and you may wish to omit it for replacement items.*

TIP: *While you do not need to use Age Protection for items that do not circulate between libraries like DVDs, including it would make things easier if the consortium policy for these items change in the future.*

The default selection for **Loan Duration** is normal. You may change this now, if applicable.

See the Circulation matrix, if needed.

http://www.in.gov/library/files/Evergreen_Indiana_Circulation_Matrix.pdf

The default selection for **Fine Level** is normal. Fine level is set at the consortial level and should not be changed.

It is not necessary to set **Circulate as Type** when using a Circulation Modifier.

Circulation Modifier should be set for the appropriate type of item. Select the type from the drop-down list and click apply. See the Circulation matrix, if needed. http://www.in.gov/library/files/Evergreen_Indiana_Circulation_Matrix.pdf

Circulation (2)	
Circulate?	
Yes	1 copy
Holdable?	
Yes	1 copy
Age Protection	
6month	1 copy
Loan Duration	
Normal	1 copy
Fine Level	
Normal	1 copy
Circulate as Type	
Nonmusical sound recording	1 copy
Circulation Modifier	
audiobook	1 copy

Miscellaneous Column

Miscellaneous (3)	
Alert Message	
<Unset>	1 copy
Deposit?	
No	1 copy
Deposit Amount	
0.00	1 copy
Price	
39.98	1 copy
OPAC Visible?	
Yes	1 copy
Reference?	
No	1 copy

You may add an **Alert Message**. If you have an alert message you often use, you may wish to create a special template for that. If an item type always has an alert message, you can include it in that item's template. For example, if you wish to alert circulation staff to check the number of discs in an audiobook you may include that in your audiobook template. You can also create templates that contain only an alert to apply with other templates as needed.

NOTE: Items with alert messages may prevent checkout at self-check stations.

The default setting for **Deposit** is No. It may be changed to yes if desired, for example if you require a deposit to check out equipment like a laptop. You may also set the **Deposit Amount**.

NOTE: Items with deposit amounts may prevent checkout at self-check stations.

To set the **Price**, enter the number, and click apply. It does not accept the \$ character. If your price does not include cents, the system will add .00 automatically. Do not enter the price in your template unless you want to set a default price for that type of material.

The default for **OPAC Visible?** is yes. This may be changed if desired, for example for materials that are for staff use only, such as equipment records.

The default for **Reference?** is no. This may be changed if applicable.

Statistics Column

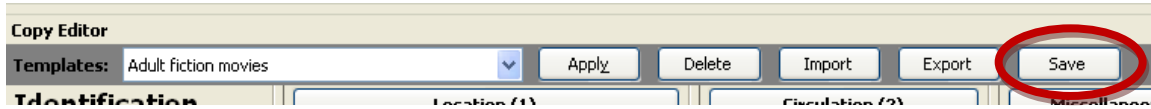
The **Statistics** column includes categories that are different for each library. You may set items as desired. For example they may include legacy categories from your old system. They may also include categories for things you wish to track circulation, for instance Indiana authors or donor collections. Reports may be used to retrieve data about these items for statistical purposes.

See **Chapter 26 – Cataloging Related Admin Functions** for more information about Statistical Categories.

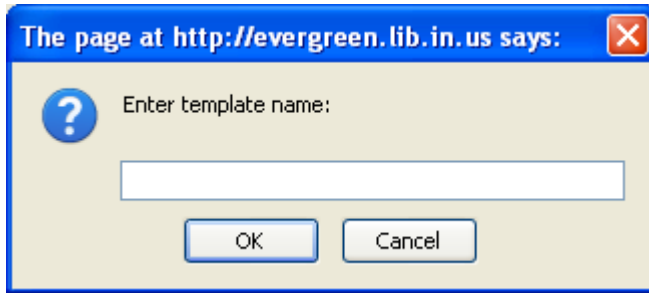
Last Updated: 9/13/2013
Version 2.2.2

Statistics (4)	
Library Filter	
EG-IN : Legacy Item Cat1	
<Unset>	1 copy
EG-IN : Legacy Item Cat2	
<Unset>	1 copy
HMMPL : Legacy Home Location	
<Unset>	1 copy
HMMPL : Legacy Item Type	
<Unset>	1 copy

Once you have set all the fields as needed for your template, click **Save** in the Template Bar at the top of the screen.

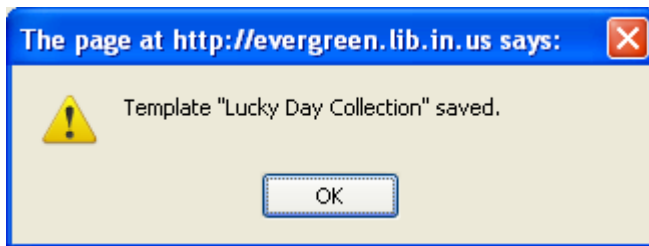


The template name box will open:



Enter a descriptive name in the box, for instance Adult New Books or Juvenile Audiobooks, which describes the use of this template. Click **OK** or press **Enter**.

A dialog box will open telling you the template has been saved.



Click **OK** or press **Enter**

If you are adding or creating an item, apply information to any fields which were not needed in your template. Then click **Modify Copies** or **Create Copies (Alt + M)** at the bottom right hand corner of the screen.

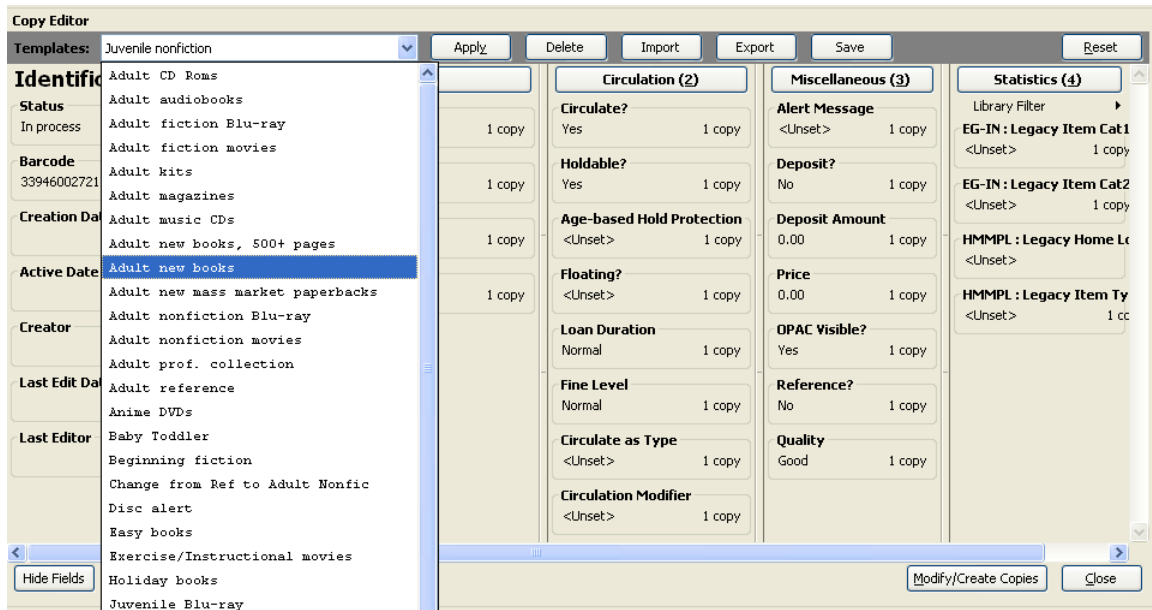
Your item will be added, and your template name will now appear in the template drop down list.

***TIP:** If you are creating a few similar templates, you can apply a template you have made, make changes, then save a new template with the desired name.*

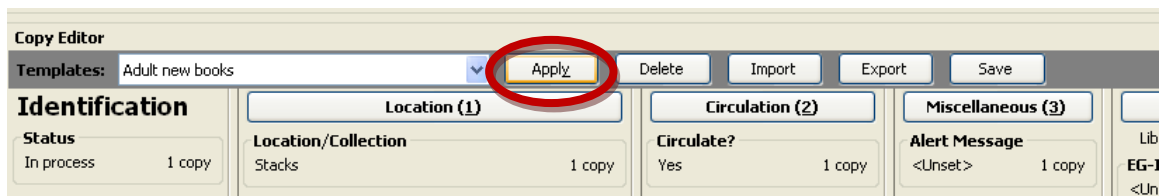
Applying Templates

When you add another item and wish to apply a template, select it from the list of templates.

TIP: The last template you applied will appear in the box, so if you are cataloging the same type of item, you will not need to re-select it.



Once the name of the desired template is displayed in the template box, click **Apply (Alt +Y)**.



Evergreen Indiana Cataloging Training Manual

Chapter 6 – Templates

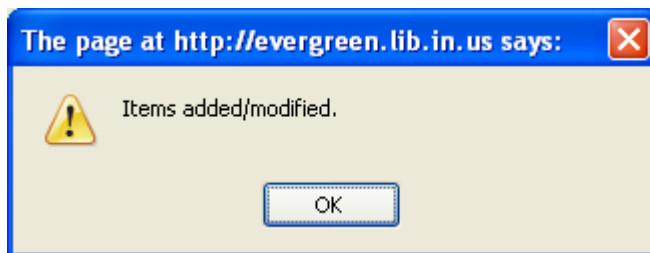
When the template is applied, the fields in that template will turn green and display the applied information.

TIP: If you apply the wrong template, you can click the *Reset* button on the top right to clear the field settings.

The screenshot shows the 'Copies' editor window. At the top, there is a 'Record Summary' for 'Harry Potter and the Chamber of Secrets'. Below that is the 'Copy Editor' section with a 'Templates' dropdown set to 'Adult new books'. The main area is divided into five panels: 'Identification', 'Location (1)', 'Circulation (2)', 'Miscellaneous (3)', and 'Statistics (4)'. The 'Circulation (2)' panel is highlighted in green. At the bottom right, the 'Modify/Create Copies' button is circled in red.

After you apply your template, do any other editing necessary, for instance adding the price or an alert message, and then click **Modify/Create Copies (Alt + M)**.

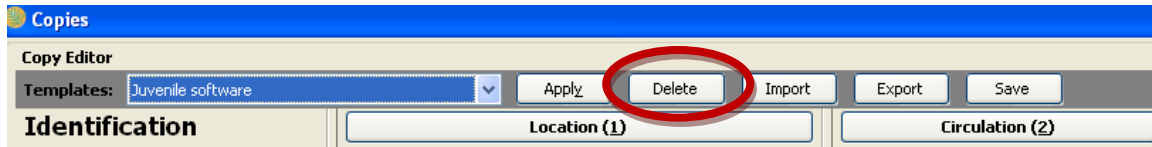
A message will appear that says **Items added/modified**.



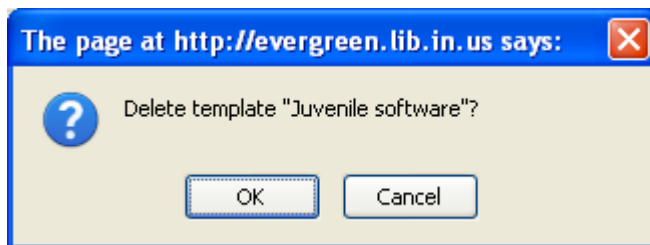
Click **OK** or press **Enter**. Your item will be added.

Deleting Templates

Deleting templates is very easy. If you no longer need a template, simply select the template you wish to delete. When the name is displayed in the box, click the **Delete** button on the Template bar.



A dialog box will ask if you want to delete the template:



A new dialog box will open telling you the template has been deleted:



Click **OK** or press **Enter**.

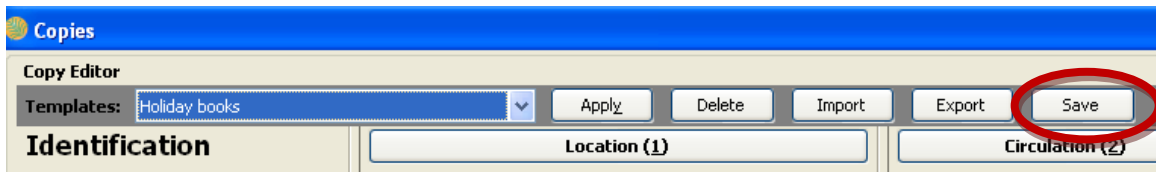
It will no longer appear in your template drop down list.

Changing Existing Templates

To change an existing template, set the fields as now desired for that template. **Creating Templates** on page 6.1 or **Chapter 7 -- Using the Copy Editor**, if needed.

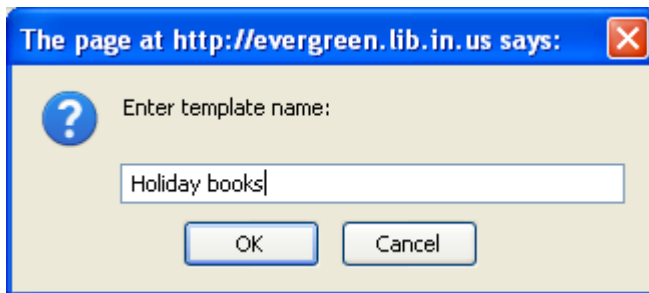
NOTE: When you apply an existing template, make changes, and then try to save the template, often the changes won't save. It works best to start from scratch.

Once the settings have been applied as desired, click the **Save** button.



The template name box will open. Enter the name of the template you wish to change.

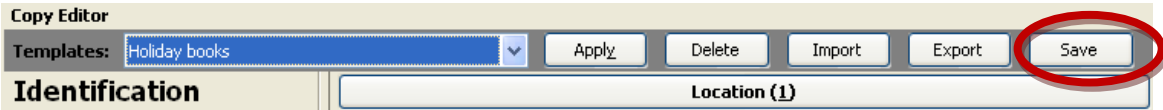
NOTE: The name must be entered exactly the same, or the template will not be changed. You will create a new template with a slightly different name than the old. Template names are case sensitive, so the capitalization must also be the same.



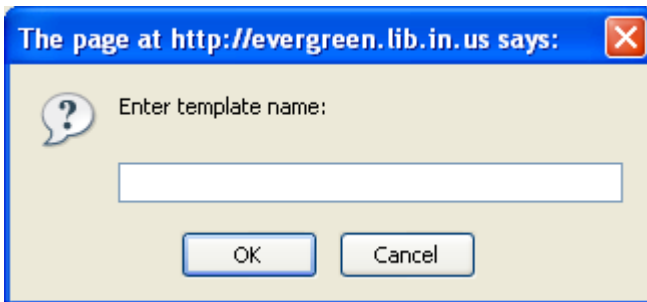
Click **OK** or press **Enter**. The old template will be replaced with the new template.

Renaming Existing Templates

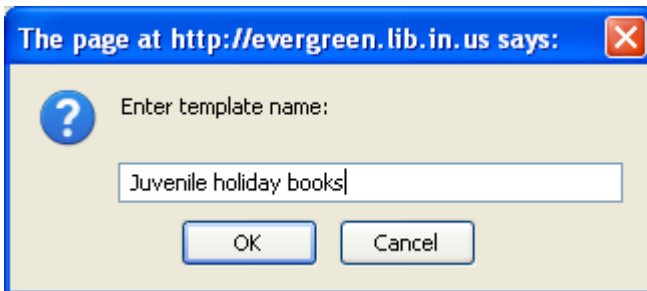
To rename an existing template, apply the template you wish to rename. See **Applying Templates** on page 6.9, if needed. Then click the **Save** button in the template line:



This will bring up the template name box:



Enter the new template name.



Click **OK** or press **Enter**. A dialog box will open telling you the template has been saved.



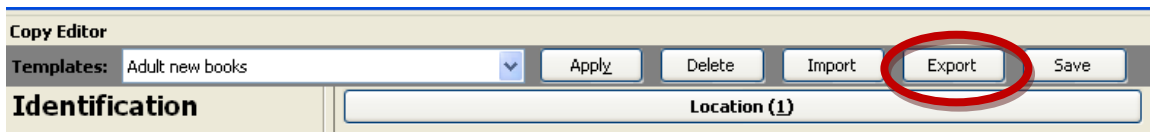
Click **OK** or press **Enter**. Then select the old template name from the template drop down list and delete it. See **Deleting Templates** on page 6.11, if needed.

Exporting Item Templates

It is possible to save your templates to an export file and then import them to a different user. This is useful if you have several catalogers on your staff. One of the catalogers can create the templates and then copies of the templates can be exported and imported to the other users' accounts. This will ensure you are all using the same templates.

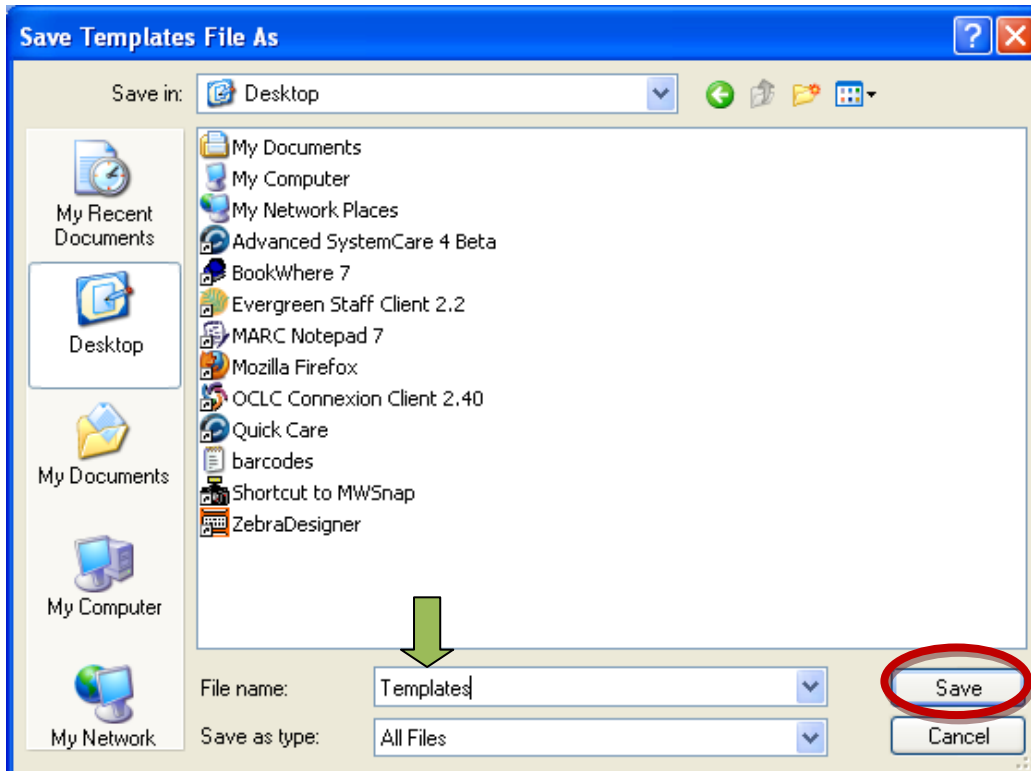
TIP: You can also use this function to transfer your templates from a Cat-2 log-in to a new Cat-1 log-in.

Open the Copy Editor. Then click the **Export** button.



The file manager will open. You will need to decide where you want to save the templates, and enter a file name. Here we are saving the templates to the Desktop, and we have given them a simple, descriptive file name.

TIP: If you wish to be able to access the templates from another computer, you may wish to save the file to a flash drive or network drive.



Last Updated: 9/13/2013
Version 2.2.2

NOTE: This will look somewhat different depending on your operating system.

The file manager will close and this dialog box will open. Click **OK**.



Click **Close(Alt + C)** to close the Copy Editor.

Now your templates should be saved in the location you indicated. In this case, the templates were saved to the desktop as seen below:

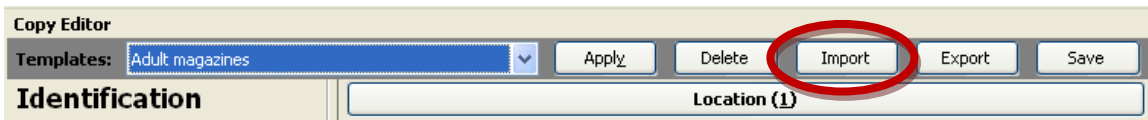


NOTE: All templates are exported as a batch. You cannot export and import selected templates. If you only wish to share one or two templates, it may be easier to simply recreate them with the other user name.

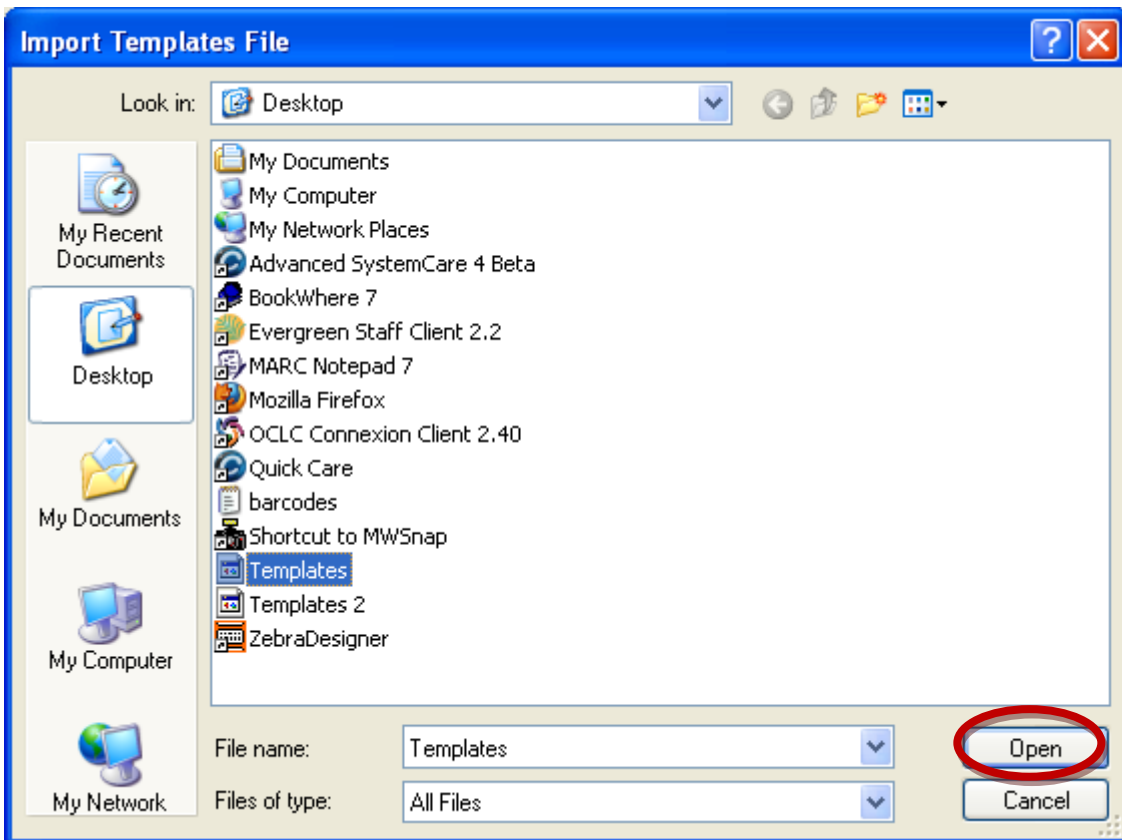
Importing Item Templates

To import templates, you need to log in with the account to which you wish to import the templates. If the templates are saved at a workstation, as we have done in this example, log out of the account where the templates were created, and then log back into Evergreen using the account where you will be importing the templates.

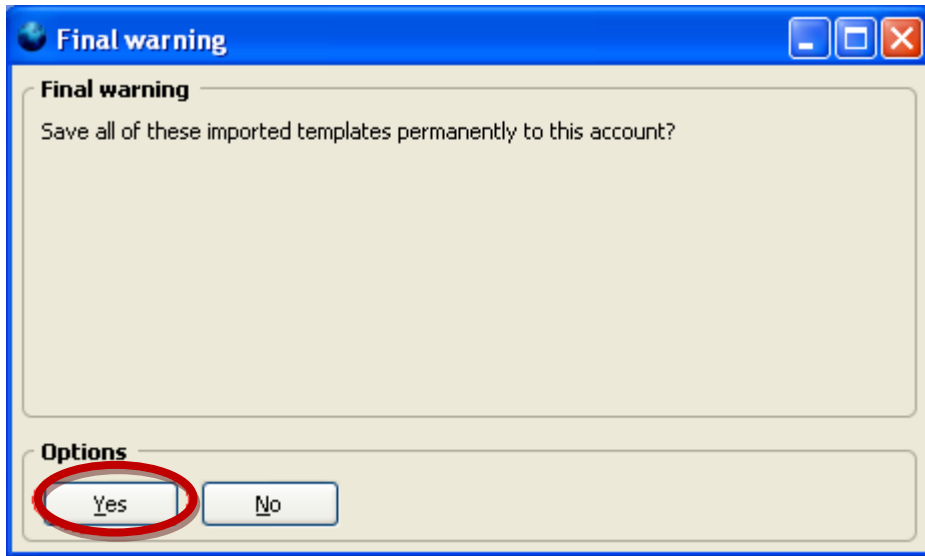
Open the **Copy Editor**. Click the **Import** button:



The File Manager will open. Select your templates file and click the **Open** button.



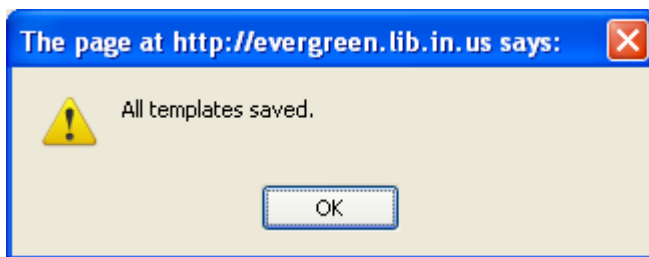
The following dialog box will open:



Click **Yes (Alt + Y)**.

NOTE: Do not worry about this dire sounding “Final Warning.” The templates are not permanent. You can delete and edit the templates after they’ve been imported.

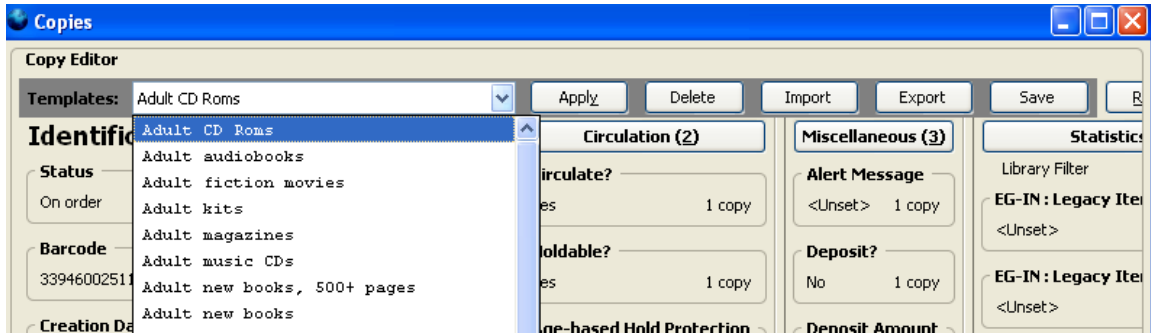
The following dialog box will open. Click **OK**.



Your templates will have been added to this account.

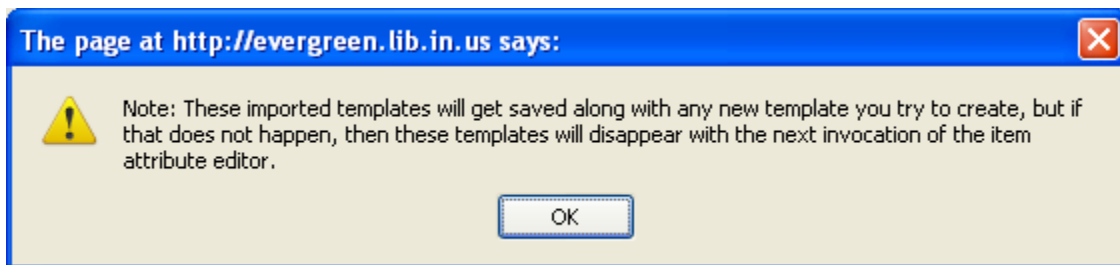
Evergreen Indiana Cataloging Training Manual

Chapter 6 – Templates



NOTE: You can import the templates to as many users as you like.

If you click **NO** at the “Final Warning” window, this dialog box will open.



Click **OK** or press **Enter**. The templates will appear to import anyway. At this point, just close the copy editor and reopen it and they will be gone.

If you import templates to an account where you already have existing templates by that name, this dialog box will open and you will have to individually approve whether or not to replace each template.

