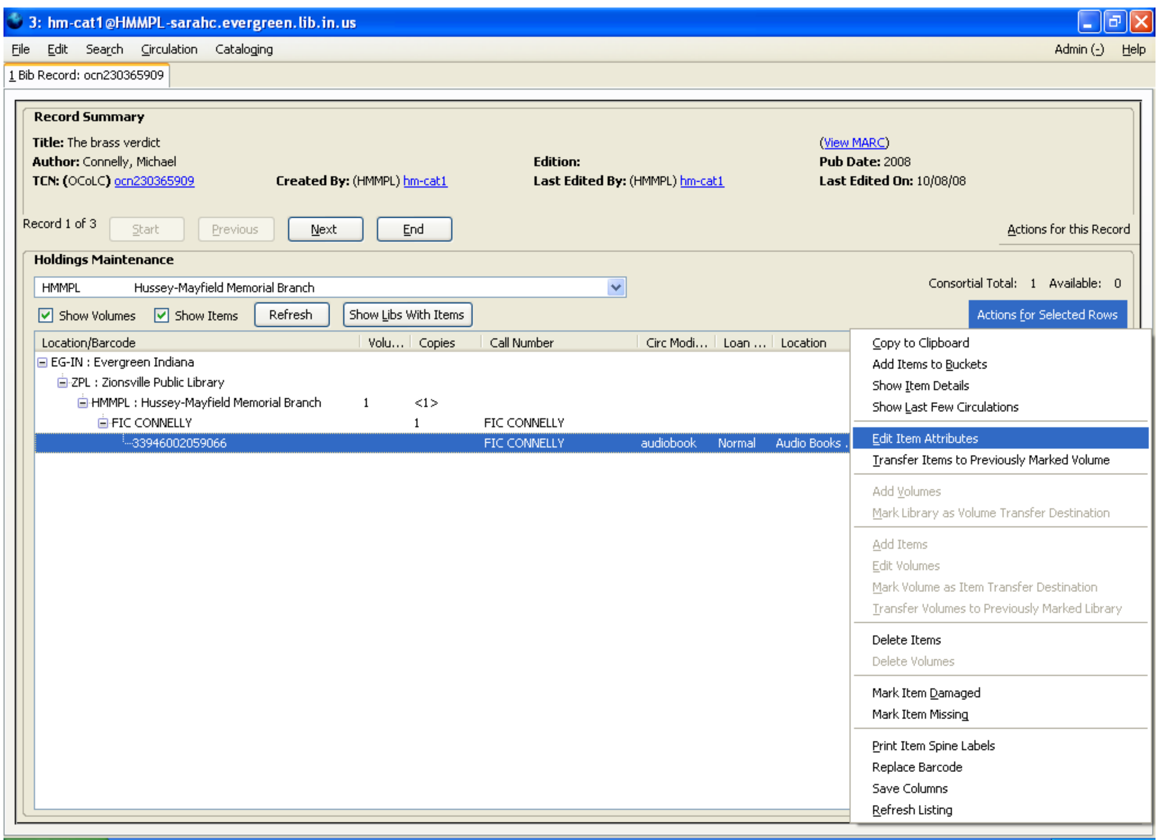
Chapter 6 -- Templates

Creating Templates

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, instead of applying this information individually you can make a template to apply the information to an item or items all at once.

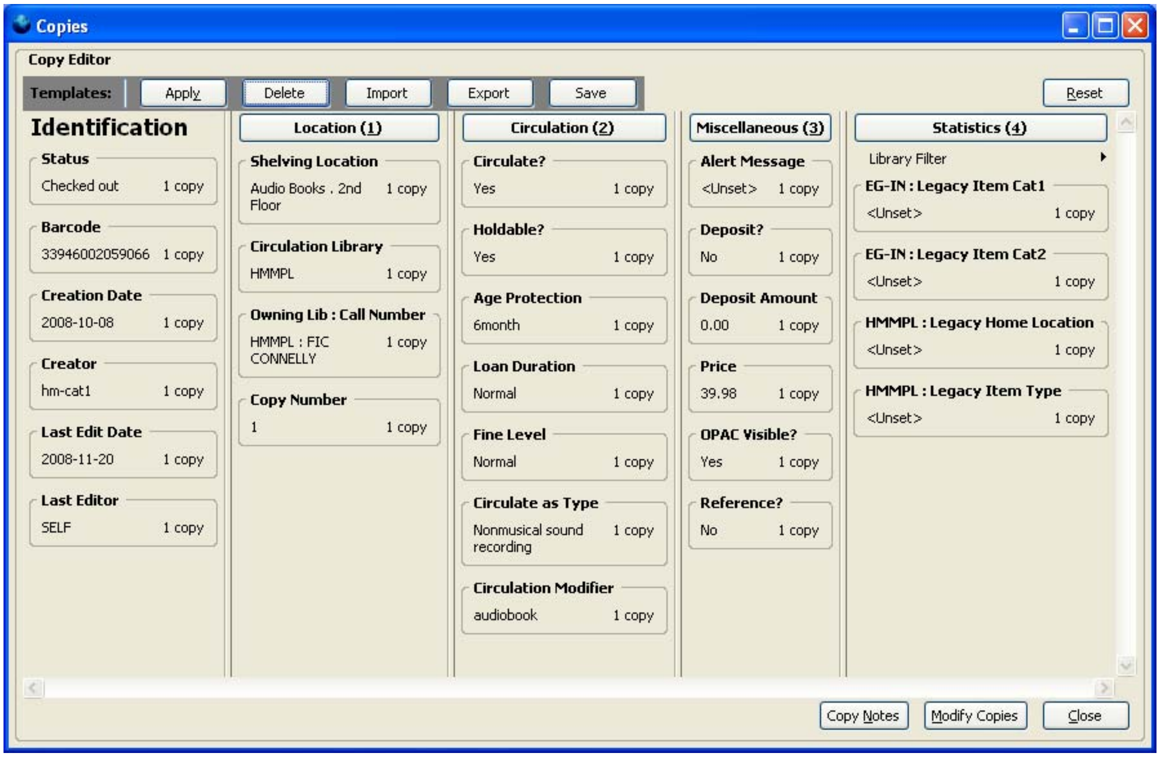
Creating templates is done from the Copy Editor. You can do this when adding holdings or using the Edit Item Attributes function.

Go to any item record in the Holdings Maintenance view. If you have an item attached to this record, you can highlight an item line and select **Edit Item Attributes (Alt + E)**

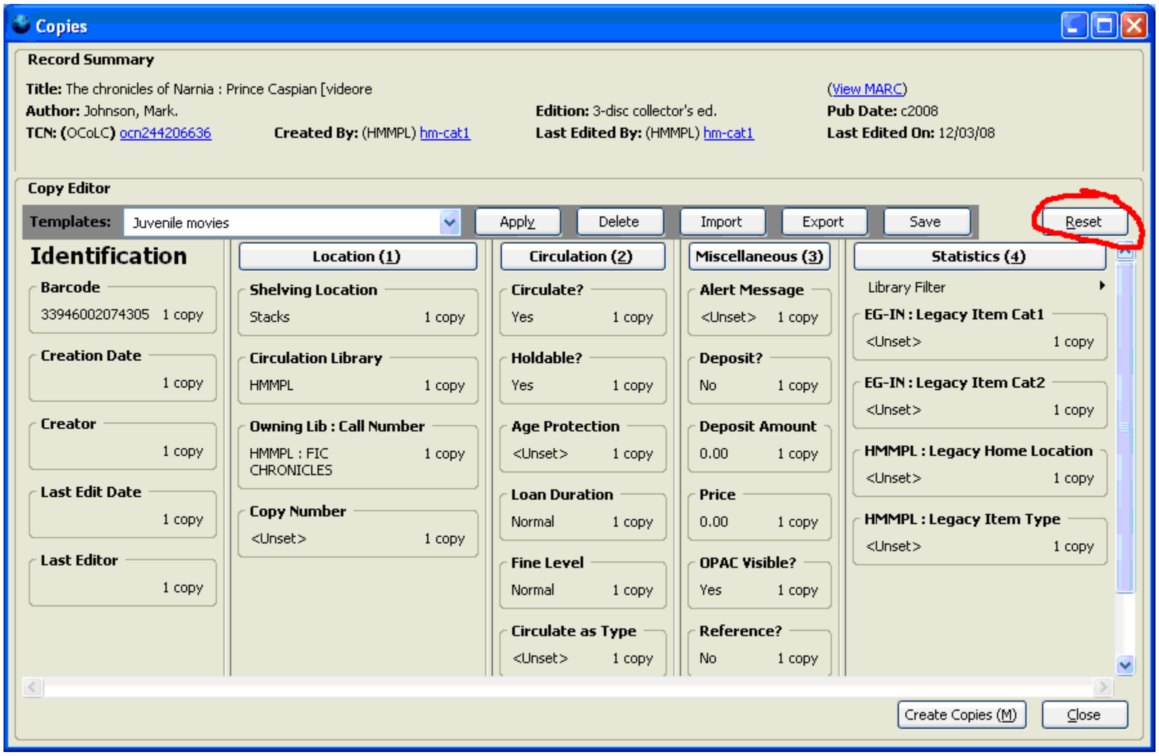


If you do not have an item attached to this record, you will highlight your library branch and go through the steps to add an item until you get to the Copy Editor. See ***Chapter 5 -- Adding Holdings***, if needed.

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 line and a row of buttons. Below this bar you will see five different columns with various kinds of volume information. The screen displayed below is the Copy Editor with no templates, accessed with Edit Item Attributes:



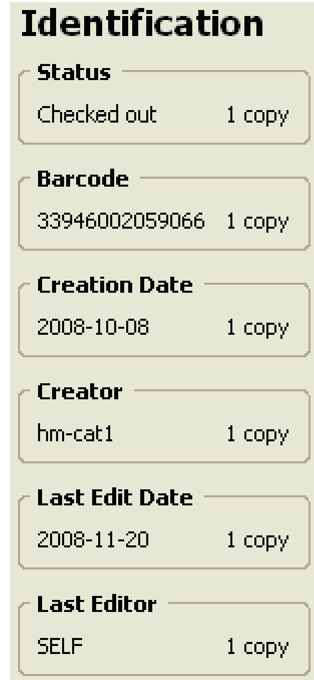
Below you will see the Copy Editor after templates have been added as it will appear when you add new copies. A dropdown box with template names appears in the Templates bar once templates have been added. Note that when adding copies, no Status box appears in the Identification column, and the Copy Editor has a Record Summary at the top.



To create a template, you will set each section individually for your item, and then save those settings as a template. Note the reset button in the upper right. If you wish to clear your settings, click **Reset (Alt + R).**

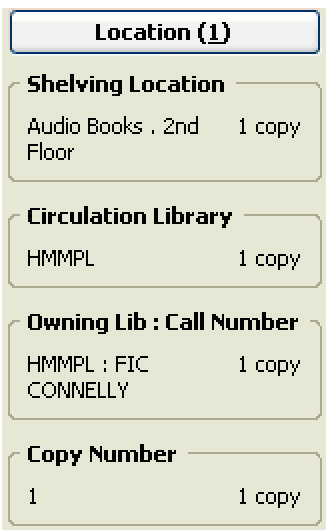
To navigate between the various boxes in the Copy Editor, you can double click on the field you wish to edit to activate it, or you can press the Tab key to move from field to field. Press **Enter** to activate the current field when tabbing between fields. To jump from one column to another, press **Alt + 1, 2, 3, or 4.** For further information about using the Copy Editor, see **Chapter 7 – Using the Copy Editor, Changes and Copy Notes.**

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. This must be done using the Edit Item Attributes function. When adding new copies, the Status column does not appear, and the default value applied is In Process. However, if you create a template from the Copy Editor with a different status, this can be applied to new copies. When you apply the template, you will not be able to see the Status until the item is created, but the Status from your template will be applied. This can be used to create templates for On Order items, or if you want certain items to be immediately Available, rather than In Process.

Location Column



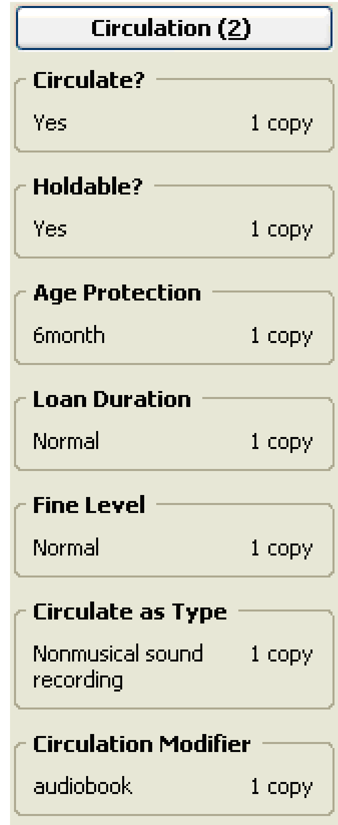
First, set the **Shelving location.** Select the location from the drop down list, and click **Apply** or type **Alt + A.** If you do not click apply, even though it appears in the box, it will not be applied to your item.

Circulation Library is automatically set to the library branch you choose when you are adding the volume. It cannot be changed from the Copy Editor

Owning Lib : Call Number is set to the call number you assigned in the Volume Editor. It cannot be changed in the Copy Editor.

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.

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

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

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

It is not necessary to set **Circulate as Type**, since this is used if you want an item to circulate according to the rules of another type of item, but you may set it to the type of item you are circulating.

You need to set the **Circulate Modifier** for the type of item. Select the type from the drop-down list and click apply.

Miscellaneous Column

You may add an **Alert Messages**. 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. If you wish to add a special alert for books which include CD-ROMs, you might create a special template for that, since you would not want to have to delete it every time you add a book that does not have a CD-ROM.

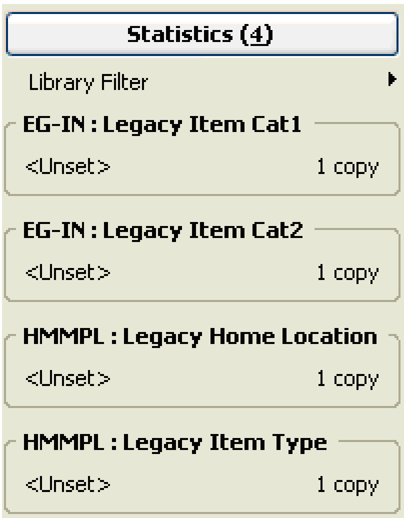
The default setting for **Deposit** is No. It may be changed to yes if desired, for example if you require a deposit to check out equipment. You may also set the **Deposit Amount**.

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 equipment records.

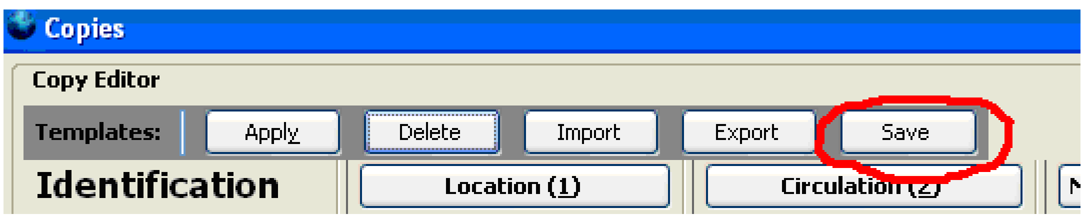
The default for **Reference?** is no. This may be changed if applicable.

Statistics Column

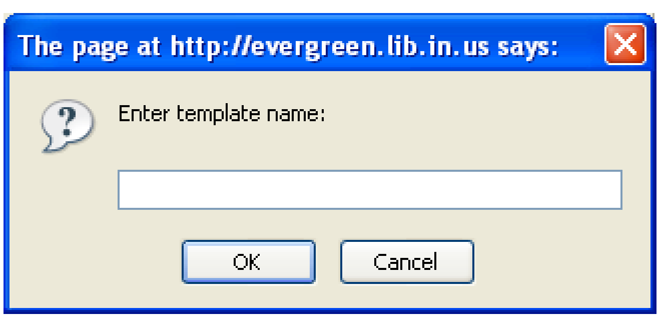


The **Statistics** column includes categories that are different for each library. You may set items as desired. For example they may include legacy categories from your old system. They may also include categories for things you wish to track circulation, for instance Indiana authors. Reports may be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

Once you have set all the categories, click **Save** in the Template Bar at the top of the screen.



This will bring up the template name box:

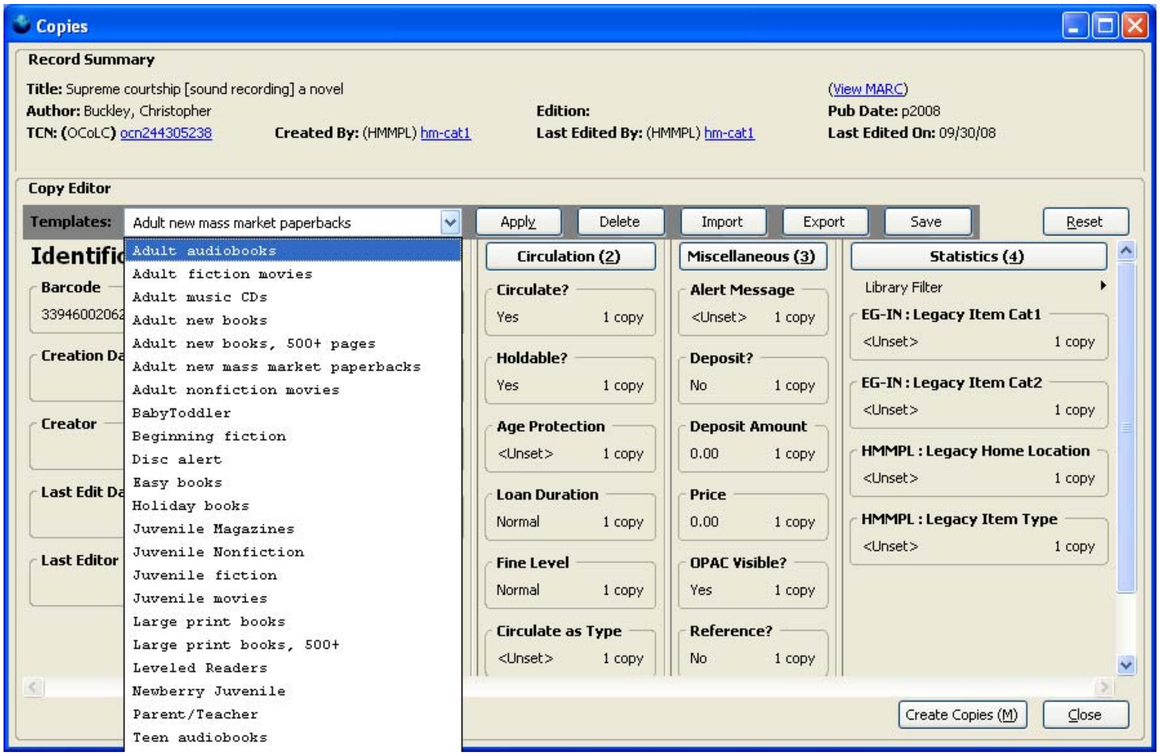


Enter a descriptive name in the box, for instance, Adult New books, or Juvenile Audiobooks, which describes the use of this template. Click **OK** or press **Enter**.

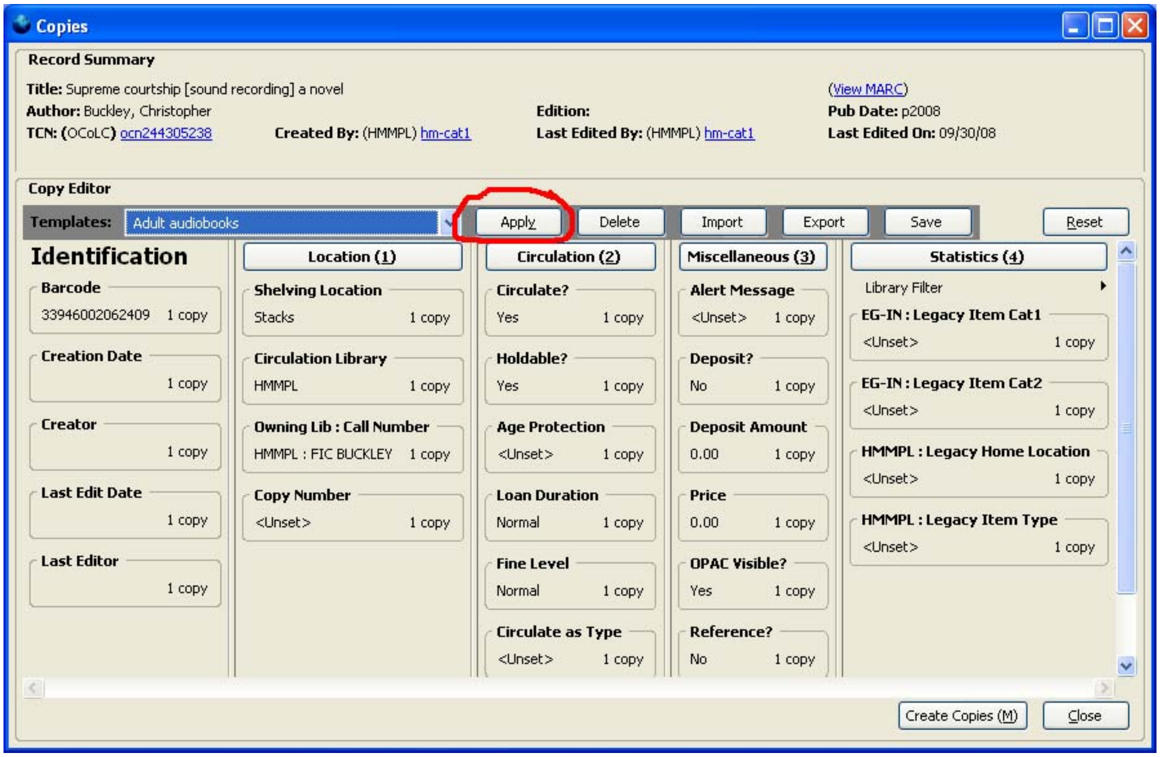
Your template name will now appear on the drop down list. The first time you create a template, you apply each of the categories individually to the item, so you do not need to apply your template. To save these changes to this item, click **Modify Copies** or **Create Copies (Alt + M)** at the bottom right hand corner of the screen**.**

Applying Templates

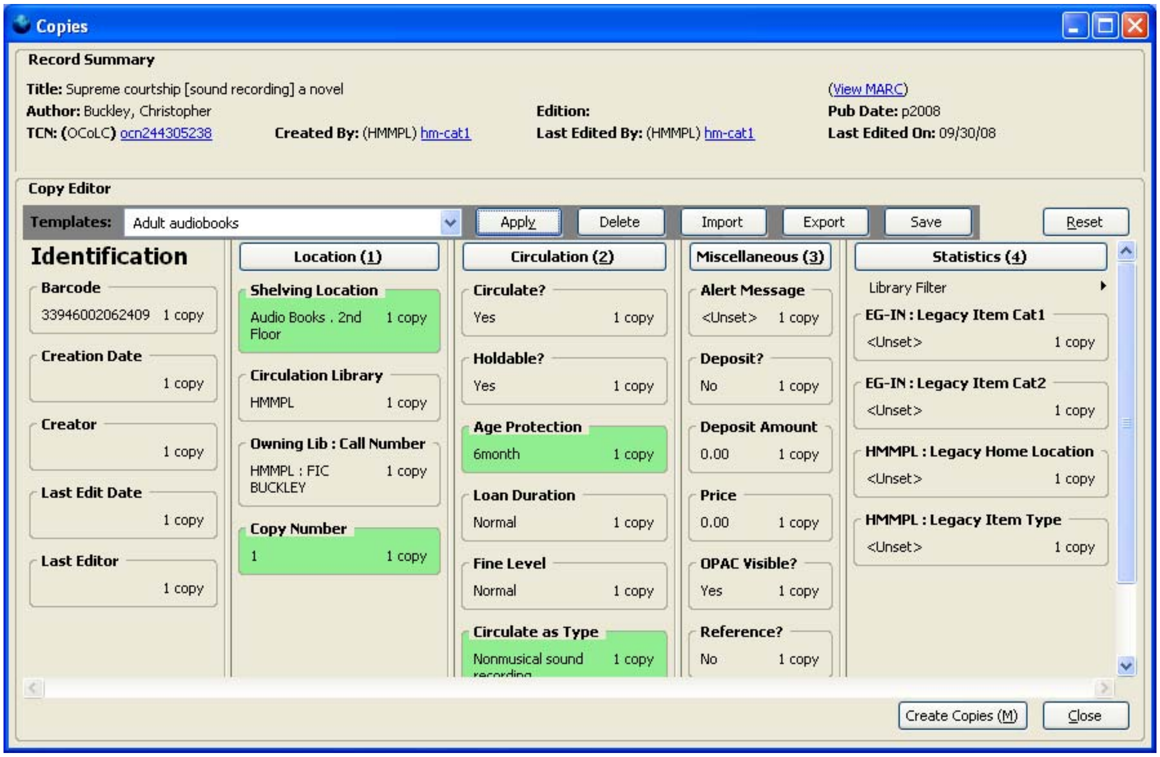
When you add another item and wish to apply the template, select it from the list of templates. If you have created only one template, it will be the only one on your list.



Once the template you need is displayed in the template box, click **Apply (Alt +Y).**



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

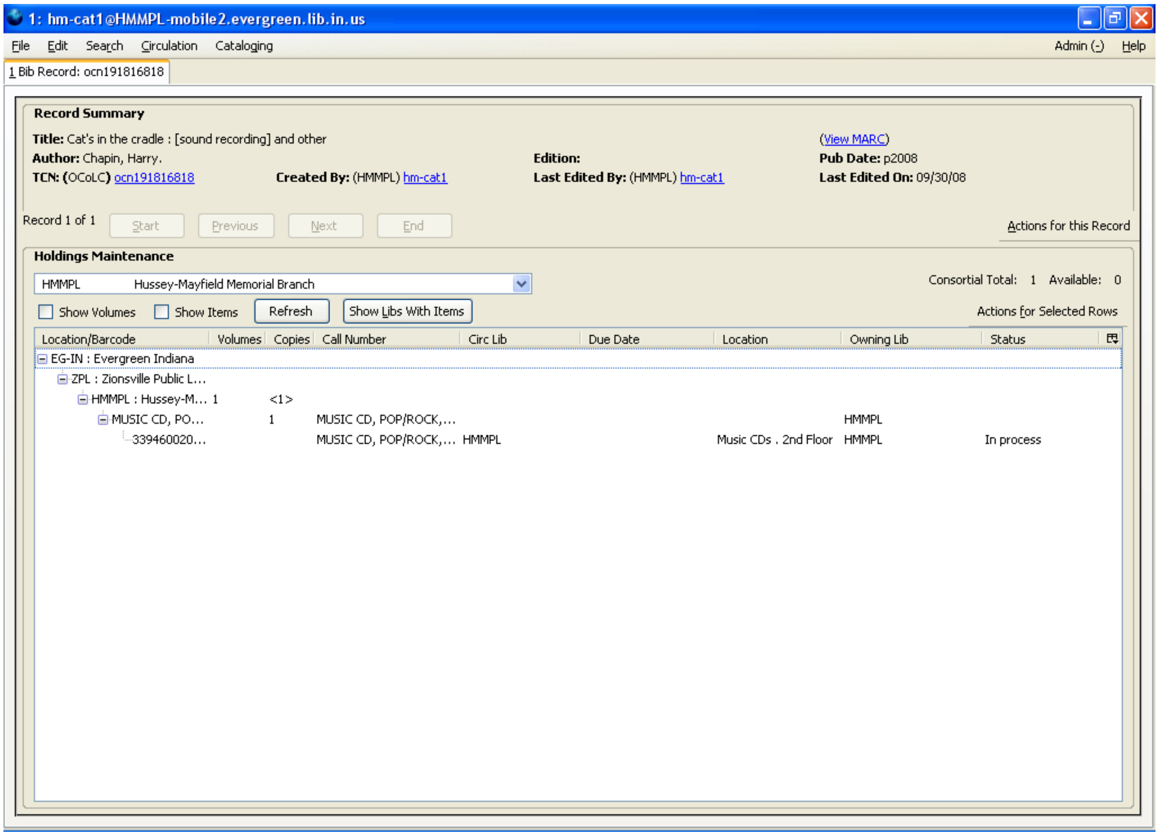


After you apply your template, do any other editing necessary, for instance, adding the price, and then click **Create Copies** or type **Alt + M.**

Click on the button at the lower right that is labeled **Create Copies.** A message will appear that says **Items added/modified**.

Click on **OK.**

Your item will appear on your holdings maintenance screen, and will reflect the attributes you have applied.



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:

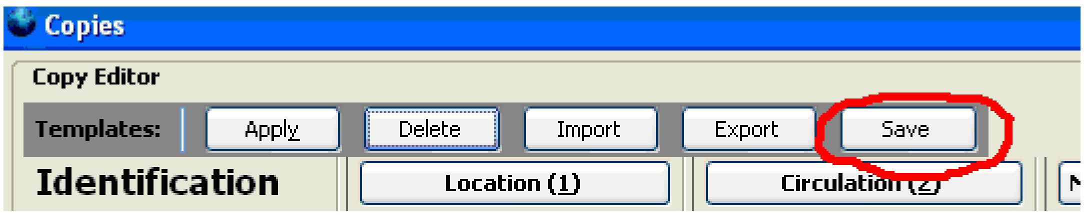
Click **OK** or press **Enter**.

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

Changing Existing Templates

To change an existing template, apply any current template. See ***Applying Templates*** on page 6.7, if needed. Change the field settings as desired. (See ***Creating Templates*** on page 6.1)

Then save a new template with the exact same name as the template you wish to change. Once the fields are set as desired, click **Save** button in the template line:



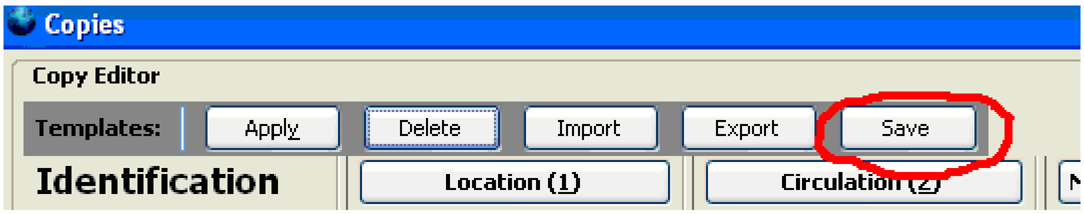
This will bring up the template name box:

Enter the exact same name as the template you wish to change. This can be the template you just applied, or a different existing template. 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.

You can also create a new template from scratch, and then give it the same name as an existing template to replace the old template with the newly created version.

Renaming Existing Templates

To rename an existing template, apply the template you wish to rename. See ***Applying Templates*** on page 6.7, 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**. The new template name will appear on the drop down list.

Now select the old template name from the template drop down list and delete it. See ***Deleting Templates*** on page 6.10, if needed.