

## Alma Essentials – Resource Management

### Working with Record Templates

When creating new records in the Metadata Editor, rather than beginning from scratch, you can start from a Record Template that includes predefined fields and content. In this session we'll show how to work with Record Templates, and how to create and edit Record Templates.

To create a New record from a template, click New. From here you can select a template to serve as a basis for your record. Before doing so, note that you can configure which templates appear in this menu, under Templates display configuration. Here you can see which templates are displayed in the menu. Let's add the MARC21 templates for Maps and Music. Click Save. And now if we open the New menu, we can select one of those templates to create a new record. Let's select the Books template. We can see our new record already has all the MARC fields typical to books, including 245 and 650, with subfield codes already in place. In this case the fields are not populated with values, save for a partial value in the 035 field, but in general, template fields can be prepopulated with values if needed. The next step here is to edit your record and save it, as we've seen in our session on editing records.

In addition to creating new records, templates can be used to expand existing records with fields from a selected template. With your record open for editing, click Editing Actions > Expand from Template. Choose a template, for example Maps. Select the Applying Method. By default, only currently missing fields will be added from the template, without overriding existing fields, or adding duplicate fields. Ok. Our record has now been expanded with fields from the Maps template.

To manage your templates, open the Templates module. Select the record type. Your templates of that type now appear in the navigation panel, divided into three folders:

Private templates are created by you and are available for your user only.

Shared templates are available for users in your institution. A grayed-out institution icon means this template is out-of-the-box and cannot be edited. A colored institution icon means it was created by someone in your institution and is available for editing.

Community templates are created by Alma users across the globe and are available to all Alma users.

Right-clicking on a Template shows you the available actions for that template.

You can create a new record from this template.

Set as Default will make the template the default template for new records of this type. Right now we can see our default template for MARC21 records is Books.

Contribute to CZ places a copy of this template in the Community Zone folder to make it available to all Alma users.

Depending on permissions, you can Delete a template.

From the Properties option you can view template information. If applicable, you can edit the Name and Description, move this template between the Shared and Private folders, or set it as Default.

To edit a template, where permissible, click on it. You can edit it like a record and save it when you're done.

To create a new template, you can right-click on an existing template and Duplicate it. Enter a name and an optional description. Select if it should be Shared or Private and click Save. You can see your template has been added and can be edited as desired.

Finally, you can create a new template from an existing record. Search for a record in Alma. Click Edit Record. The Metadata Editor opens the record for editing. Open the Save menu and click Save as a Template. Fill in the template information and click Save. And now if we go back to the Templates module, we can see our new template is available for editing.

Thanks for joining!