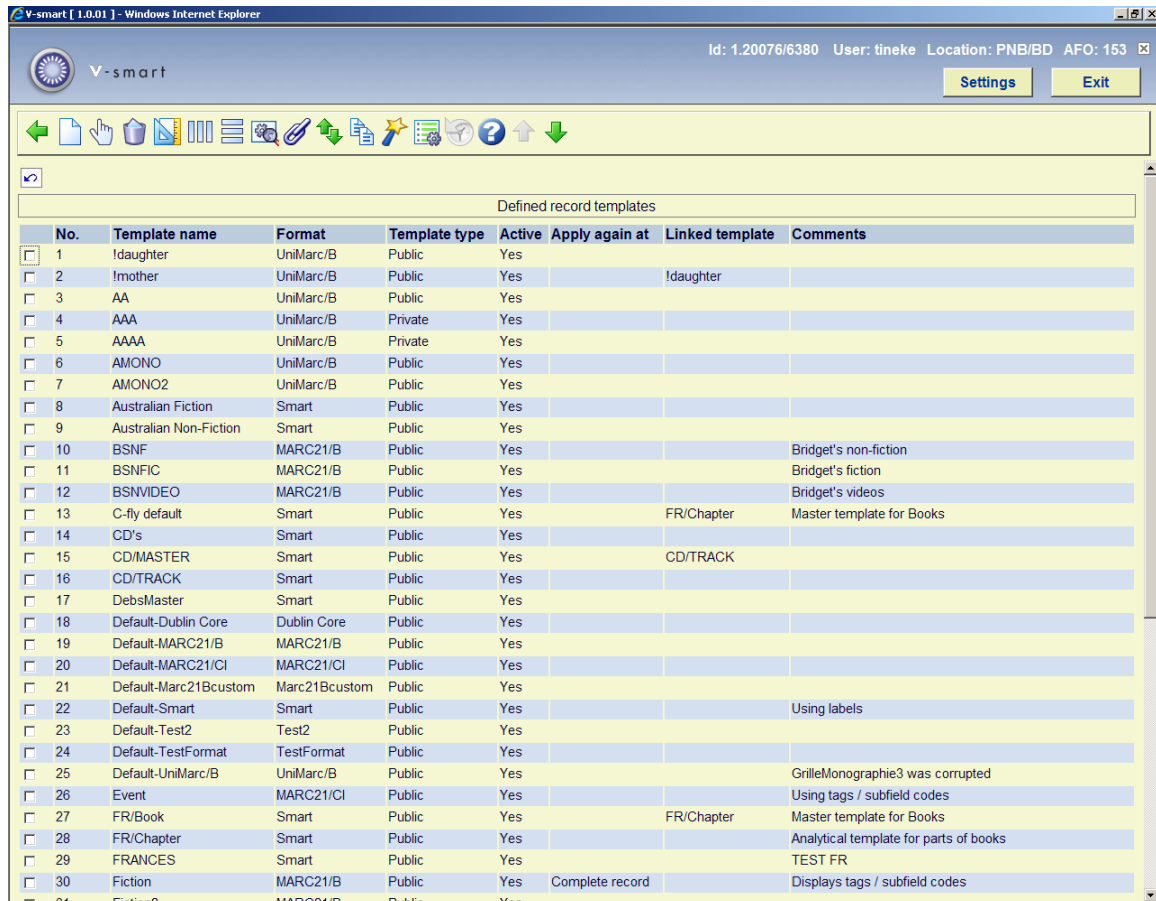


AFO 153 – Template management for records

153.1 Introduction When you choose AFO 153 a list of available templates will be displayed:



The screenshot shows the V-smart interface in a Windows Internet Explorer browser. The title bar reads "V-smart [1.0.01] - Windows Internet Explorer". The interface includes a navigation bar with a logo, user information (Id: 1.20076/6380, User: tineke, Location: PNB/BD, AFO: 153), and buttons for "Settings" and "Exit". Below the navigation bar is a toolbar with various icons. The main content area displays a table titled "Defined record templates".

No.	Template name	Format	Template type	Active	Apply again at	Linked template	Comments
<input type="checkbox"/>	1	!daughter	UniMarc/B	Public	Yes		
<input type="checkbox"/>	2	!mother	UniMarc/B	Public	Yes	!daughter	
<input type="checkbox"/>	3	AA	UniMarc/B	Public	Yes		
<input type="checkbox"/>	4	AAA	UniMarc/B	Private	Yes		
<input type="checkbox"/>	5	AAAA	UniMarc/B	Private	Yes		
<input type="checkbox"/>	6	AMONO	UniMarc/B	Public	Yes		
<input type="checkbox"/>	7	AMONO2	UniMarc/B	Public	Yes		
<input type="checkbox"/>	8	Australian Fiction	Smart	Public	Yes		
<input type="checkbox"/>	9	Australian Non-Fiction	Smart	Public	Yes		
<input type="checkbox"/>	10	BSNF	MARC21/B	Public	Yes		Bridget's non-fiction
<input type="checkbox"/>	11	BSNFIC	MARC21/B	Public	Yes		Bridget's fiction
<input type="checkbox"/>	12	BSNVIDEO	MARC21/B	Public	Yes		Bridget's videos
<input type="checkbox"/>	13	C-fly default	Smart	Public	Yes	FR/Chapter	Master template for Books
<input type="checkbox"/>	14	CD's	Smart	Public	Yes		
<input type="checkbox"/>	15	CD/MASTER	Smart	Public	Yes	CD/TRACK	
<input type="checkbox"/>	16	CD/TRACK	Smart	Public	Yes		
<input type="checkbox"/>	17	DebsMaster	Smart	Public	Yes		
<input type="checkbox"/>	18	Default-Dublin Core	Dublin Core	Public	Yes		
<input type="checkbox"/>	19	Default-MARC21/B	MARC21/B	Public	Yes		
<input type="checkbox"/>	20	Default-MARC21/CI	MARC21/CI	Public	Yes		
<input type="checkbox"/>	21	Default-Marc21Bcustom	Marc21Bcustom	Public	Yes		
<input type="checkbox"/>	22	Default-Smart	Smart	Public	Yes		Using labels
<input type="checkbox"/>	23	Default-Test2	Test2	Public	Yes		
<input type="checkbox"/>	24	Default-TestFormat	TestFormat	Public	Yes		
<input type="checkbox"/>	25	Default-UniMarc/B	UniMarc/B	Public	Yes		GrilleMonographie3 was corrupted
<input type="checkbox"/>	26	Event	MARC21/CI	Public	Yes		Using tags / subfield codes
<input type="checkbox"/>	27	FR/Book	Smart	Public	Yes	FR/Chapter	Master template for Books
<input type="checkbox"/>	28	FR/Chapter	Smart	Public	Yes		Analytical template for parts of books
<input type="checkbox"/>	29	FRANCES	Smart	Public	Yes		TEST FR
<input type="checkbox"/>	30	Fiction	MARC21/B	Public	Yes	Complete record	Displays tags / subfield codes

The best way to start is by copying the template "default-Smart" and then edit this to reflect your needs.

You can also create a new template by clicking on the icon **New template**. This will bring up the following input form:

Fields on the form

The **Name** of the template.

Public or private: whether this template can only be used by the current password or by everyone. If this is a template to be used by cataloguer, then it should be a public template.

Comments: free text.

The **Format** for which this template is meant.

Used for field addition/update only: when this option is ON, the template can be used for the option Add/Update field(s) using template in AFO 111.

I.e. you create a simple template that only displays labels and data entry fields for its subfields. Indicators are hidden. This feature is typically useful for non-cataloguing staff (e.g. acquisitions department) who need to add their own specific information to the record without knowledge of the bibliographic format or other technical details - the data entry form only contains the fields that they need.

Note

This type of template can NOT contain any **fixed fields**.

It is recommended NOT to define authority controlled fields (such as author name or subject heading) in this type of template, because no checks are made with this workflow.

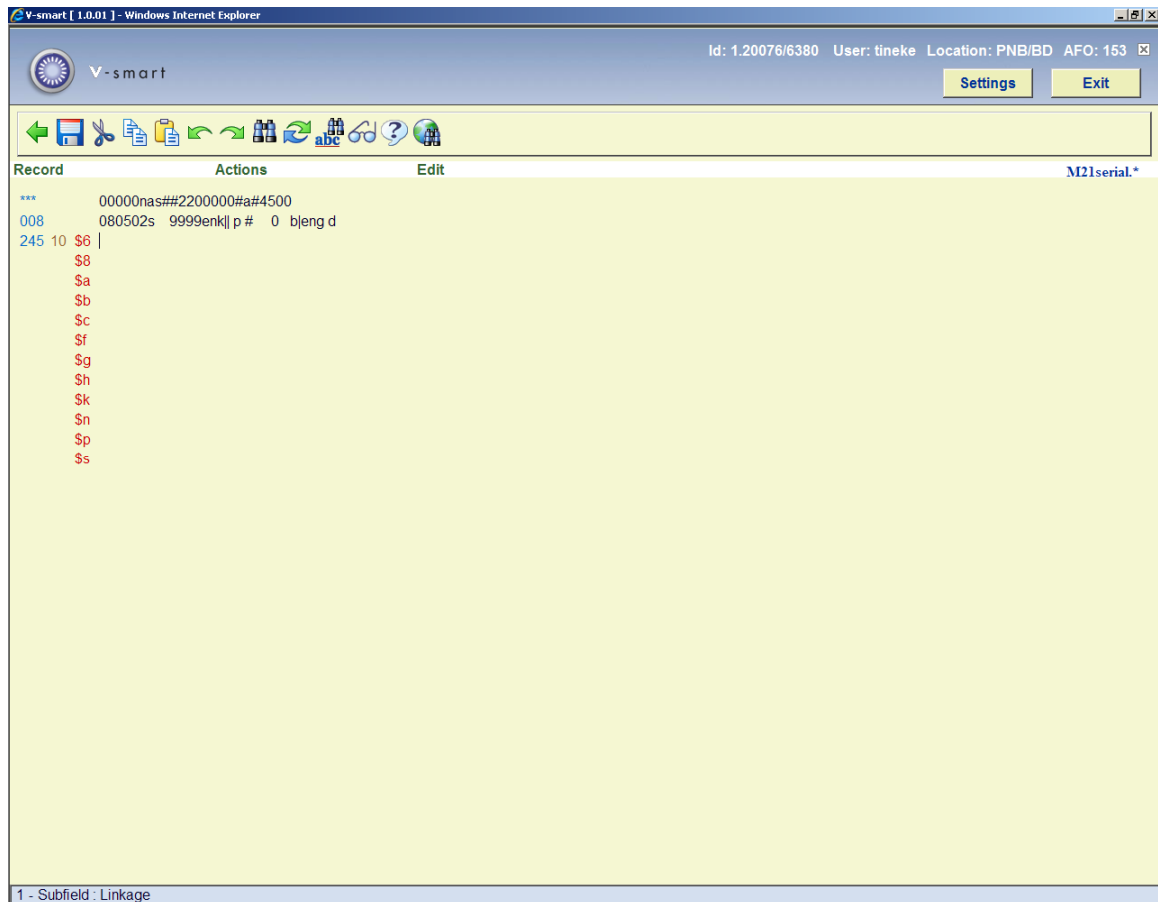
Show template in cataloguing module: if you set this parameter you can create a template, but it will not be available for use in the cataloguing module.

Apply template again at record status: choose a record status to which this template must be re-applied. The effect of this option is that also the fields that are valid but contain no data are shown again when editing a record. Normally all empty (sub)fields are removed when filing a record. When you choose provisional record and then apply this status to a bibliographic record, you will be offered the full template when next editing this bibliographic record.

Begin with no fields, mandatory fields or selected fields. When you choose 'no fields' you start with an empty form. When you choose 'mandatory fields' you start with the already defined mandatory fields (in the Smart format these are language and title). When you choose 'selected fields' you will be offered the fields as defined in the default template.

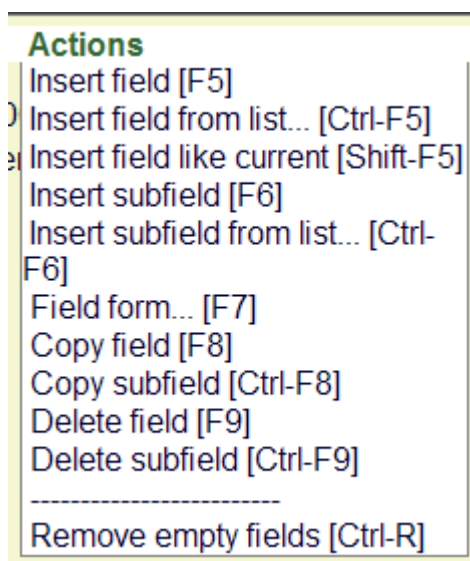
When you have completed the form click on **OK**, and your template will be added to the list of defined templates.

You have the choose between empty, mandatory fields or selected fields. We recommend you start with mandatory or selected and not with an empty template. This results in a screen like the one below (mandatory fields):



The record editor is the same as in AFO 111. You can add and delete fields and subfields until you have created the template you need. Do *not* change the field names here.

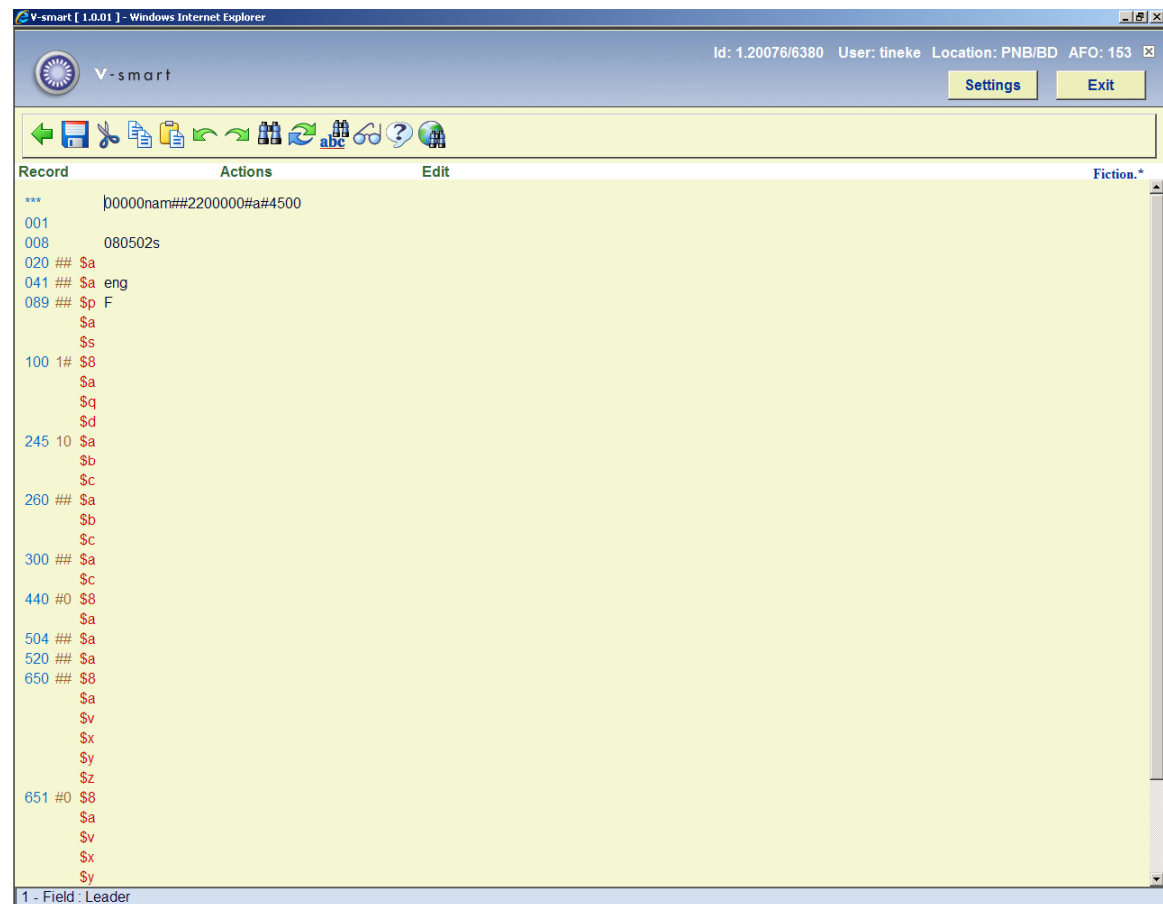
To add or delete fields see under Actions.



This offers you options for adding or deleting (sub)fields.

Ensure that “<Enter> Key creates New (Sub)field” is not set. Otherwise you will get a row of question marks every time you hit enter. This is set via your Preferences.

See below for a more extensive example:



As you can see the field 'language' (041) already contains data. This means you do not have to enter this in AFO 111.

More about this can be found in the chapter on cataloguing.

153.2 The properties of a template

From the list of templates you can edit the properties of each template. To do so select a template and then click on one of the icons described below.

Click on **View classes** to edit the presentation style for each element of the template. These elements are: normal text, field labels, subfield labels and four types of data. What you can change is: the display colour and whether or not the display should be in bold and/or italics.

Click on **View columns** to edit the presentation of the various columns. The columns are: General, Fields, Indicators, Subfields and Data. When you double click on one of them you can amend the following properties:

- Whether you want to display the code or the label (that is the full name, wording).
- What the edit mode is: Insert, No change allowed, Overwrite.
- The maximum width of the column (in number of characters).
- The characters that are allowed in the column. When nothing is entered here, all characters are valid.
- Substitution character.

Click on **View fields/subfields** to change the field labels for the languages Dutch, English and French. Note that you only change the wording as used in the template, not the wording within the format. You can do this for both fields and subfields.

Click on **General information template** to set certain parameters that could also be set on creation of the template. These are: whether the template is private or public, comments, whether the template is available in the cataloguing module, when the template must be re-applied.

Click on **Replace selected template** to replace the contents of the selected template with the contents of another template (which can be selected from a dropdown list).

The icon **Copy template** is similar to **Replace selected template**, the difference being that you copy the contents of the selected template to a new template.

Click on **Parameters** to set how the fields and subfields must be displayed in the dropdown list that is presented when adding a new (sub)field, for instance in the record editor in AFO 111. The choice is between 'first text then code' and 'first code, then text'.

Once the template has been created you can start using it when creating new records through AFO 111.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	May 2008	creation	
2.0	October 2010	New option for simple template part of 2.0.06 updates	