

06 Create cataloging template for a BIBFRAME Work based on existing Work

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In this exercise we will edit a BIBFRAME Work, choose "Save as Template" and check the box "Save Template with Record Content". This will enable us to create a template which has some fields which do have pre-existing text and some fields which do not have pre-existing text.



Be careful to not by accident click "Save Record" or "Save Draft".

This is because we are making changes to the record below to save it as a template, and not to change the actual existing record. Therefore, we will click "Save as Template" and not "Save Record" or "Save Draft".

ONE

Search for a BIBFRAME Work which will be used as the basis for the new template. Use the "Works" repository search. You can use the Work which we created in a previous exercise or any other Work in the repository

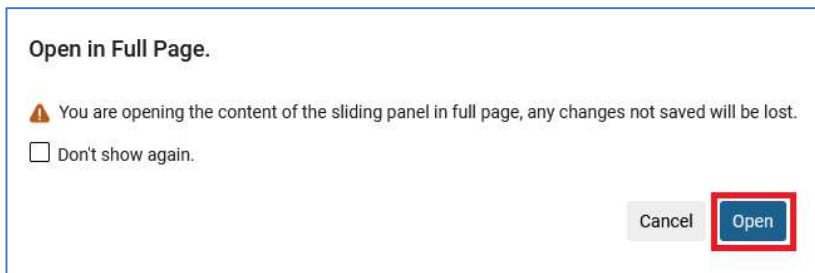
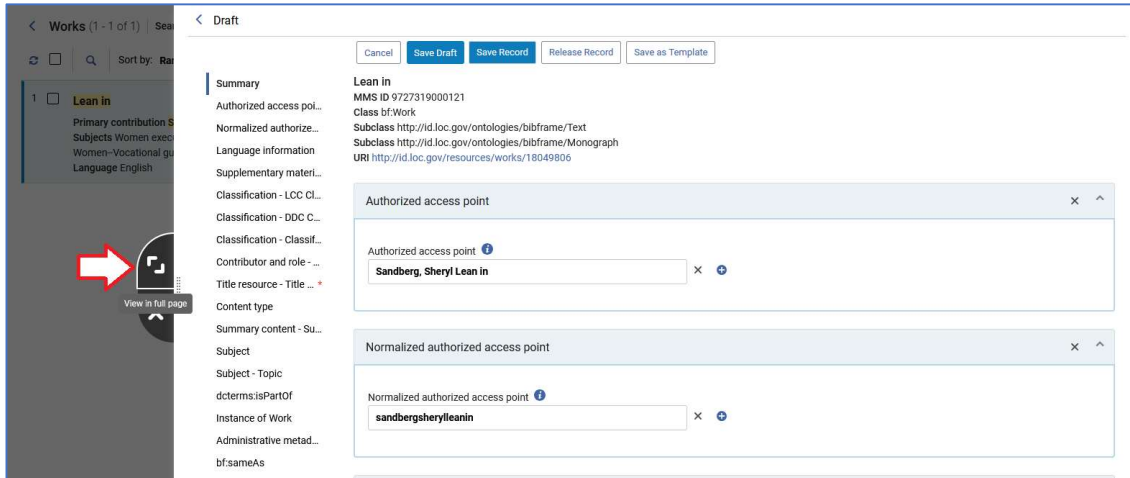
Upon locating the record click "Edit Record".

The screenshot shows the Ex Libris interface with the following details:

- Top navigation bar: Works (selected), Keywords, Lean in Sheryl Sandberg
- Search bar: Find specific facet
- Search results: Works (1 - 1 of 1) | Search Query: Keywords Contains Keywords "Lean in Sheryl Sandberg"
- Sort by: Rank, Secondary sort by: Rank
- Record details:
 - Title: Lean in
 - Primary contribution: Sandberg, Sheryl
 - Subjects: Women executives ; Leadership in women ; Women--Vocational guidance and others
 - Language: English
 - MMS ID: 9727319000121
 - Creation date: 03/09/2025 14:28:27 IDT
 - Modification date: 03/09/2025 14:28:27 IDT
 - Instances: 1
- Buttons: View Work, Edit Record (highlighted), ...

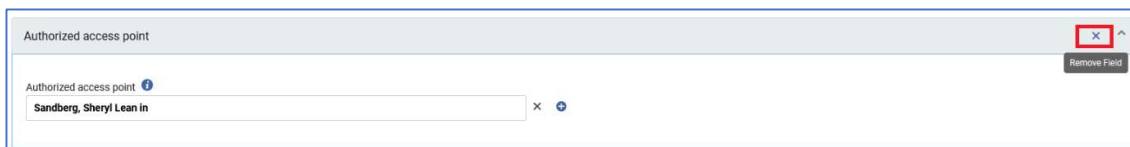
TWO

The Linked Open Data for BIBFRAME Editor opens with the record as a draft. Click to open in full page view



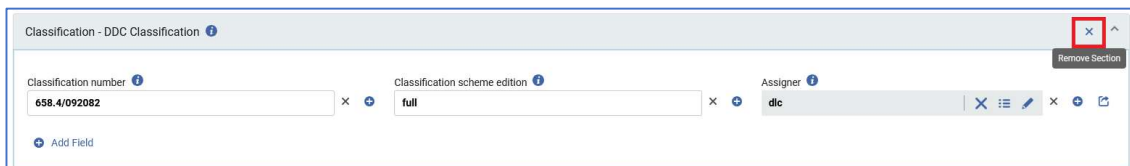
THREE

For fields which you do not want to appear in the template click the "X" to the right of the field name as in the screenshot below



FOUR

For sections which you do not want to appear in the template click the "X" to the right of the section name as in the screenshot below



FIVE

Summary regarding which fields and sections have been removed and which fields and sections remain.

We have removed the following fields (this may differ per person depending on the record chosen):

- Authorized access point
- Normalized authorized access point
- bf:sameAs

We have removed the following sections (this may differ per person depending on the record chosen):

- Classification - DDC Classification
- Classification - Classification entity
- Subject - Topic
- Administrative metadata - Administrative metadata

We still have the following fields (this may differ per person depending on the record chosen):

- Language information
- Supplementary material (X 2)
- Content type
- Summary content - Summary (X 2)
- Subject (X 4)
- dcterms:isPartOf
- Instance of Work

We still have the following sections (this may differ per person depending on the record chosen):

- Classification - LCC Classification
- Contributor and role - Contribution
- Title resource - Title entity

SIX

We will now save the record as it is now **as a template**. Later we will further edit the template by removing text in some of the existing fields, and be adding additional fields.

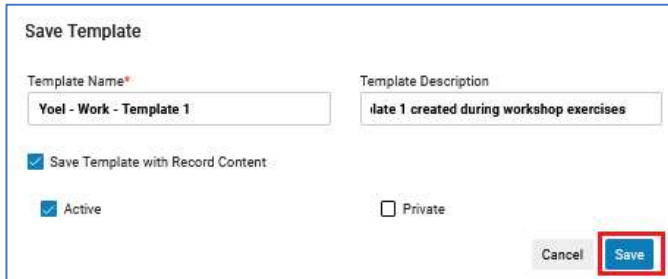
Click "Save as Template".

The screenshot shows a web interface for editing a record. At the top, there are several buttons: 'Cancel', 'Save Draft', 'Save Record', 'Release Record', and 'Save as Template'. The 'Save as Template' button is highlighted with a red rectangular box. Below the buttons, there is a list of fields on the left and their corresponding values on the right. The fields include Summary, Language information, Supplementary material, Classification - LCC Cl..., Contributor and role - ..., Title resource - Title..., Content type, Summary content - Su..., Subject, dcterms:isPartOf, and Instance of Work. The 'Language information' field is currently selected and shows the value 'eng'.

- Give template name "[Your first name] - Work - Template [number]"
 - For example, "Yoel - Work - Template 1"
- Give template description "[Your first name] - Work - Template [number] created during workshop exercises"
 - For example, "Yoel - Work - Template 1 created during workshop exercises"

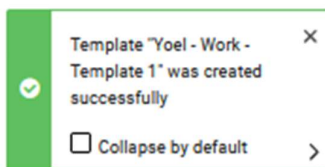
- Check the box "Save Template with Record Content"
- Leave checked the box "Active" (because we want catalogers to be able to use this template)
- Uncheck the box "Private" (because we want all catalogers to be able to use this template)

Click "Save"



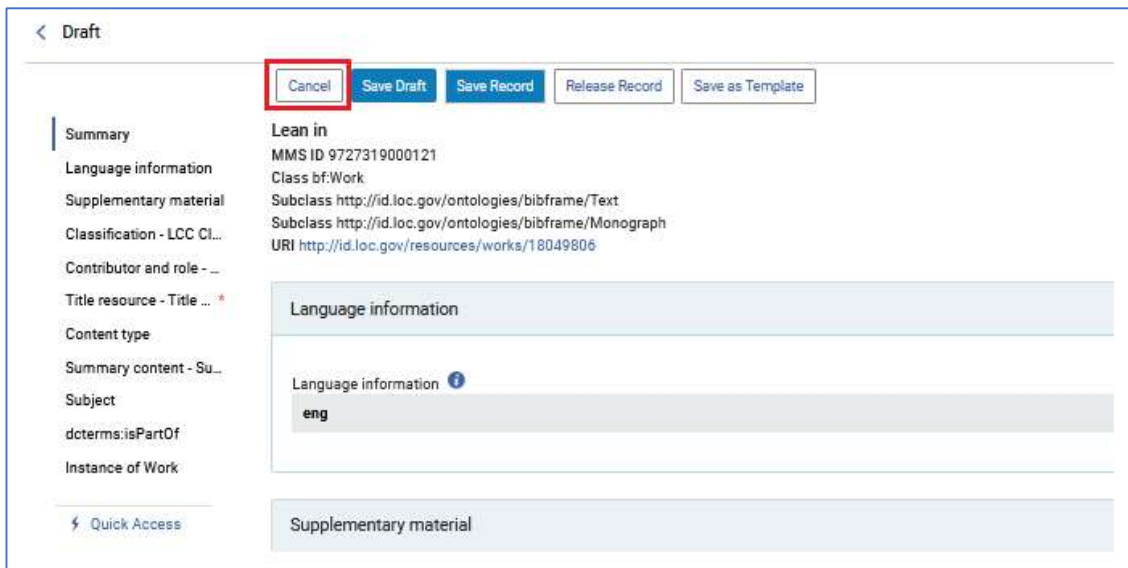
The 'Save Template' dialog box contains the following fields and options:

- Template Name***: Yoel - Work - Template 1
- Template Description**: late 1 created during workshop exercises
- Save Template with Record Content
- Active
- Private
- Buttons: Cancel, Save (highlighted with a red box)



SEVEN

Click "Cancel" to get out of draft mode for the record and then go "Back"



The 'Draft' page shows the following elements:

- Buttons: Cancel (highlighted with a red box), Save Draft, Save Record, Release Record, Save as Template
- Summary**: Lean in
- Language information**: MMS ID 9727319000121
- Supplementary material**: Class bf:Work
- Classification - LCC Cl...**: Subclass <http://id.loc.gov/ontologies/bibframe/Text>
- Contributor and role - ...**: Subclass <http://id.loc.gov/ontologies/bibframe/Monograph>
- Title resource - Title ... ***: URI <http://id.loc.gov/resources/works/18049806>
- Content type**: Language information
- Summary content - Su...**: Language information ⓘ
- Subject**: eng
- dcterms:isPartOf**: Supplementary material
- Instance of Work**: Quick Access

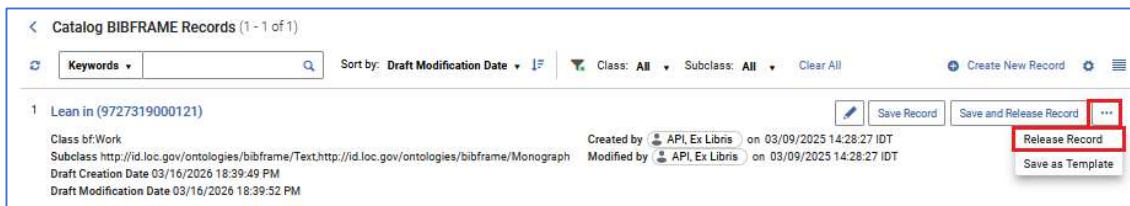
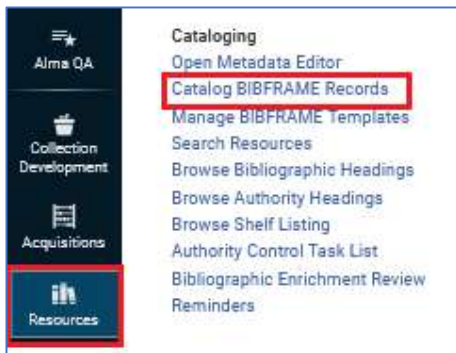


EIGHT

The record may still be open as a draft. If so, release it. (This is not mandatory for the creation of the template, but we are doing this for organizational purposes in the repository).

Do "Resources > Cataloging > Catalog BIBFRAME Records"

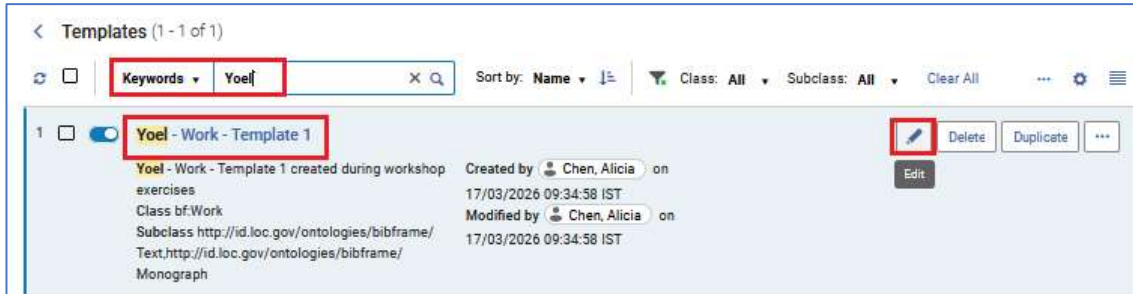
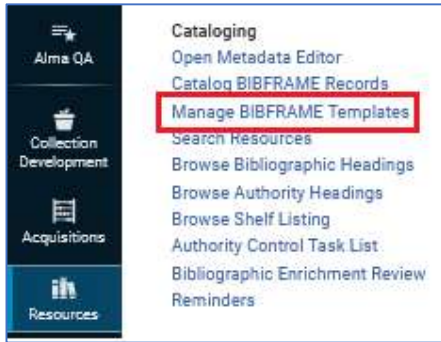
Release the record



NINE

Edit the template

- Do "Resources > Cataloging > Manage BIBFRAME Templates"
- Find your template
- Click the pencil icon to edit



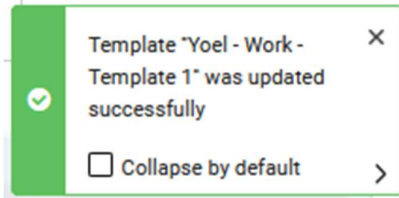
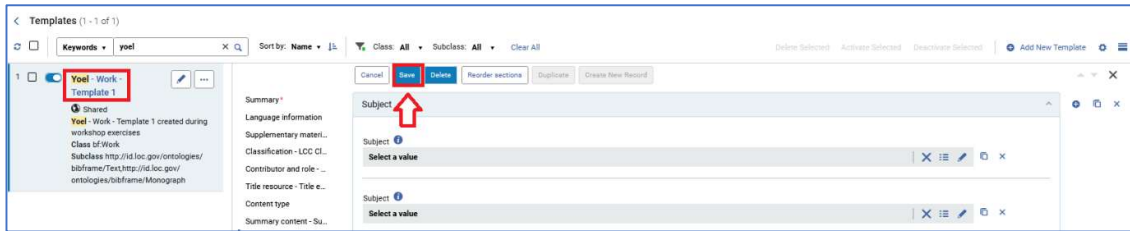
TEN

We will edit the template as follows. In your specific case do as desired, which should be similar to this:

- "Language Information" field
 - Leave it as English
- "Supplementary material" fields
 - Leave as they are. One has value "bibliography" and one has value "index".
- "Classification - LCC Classification" section
 - Make the "Classification number" and "Classification item number" be blank
 - Leave the "Assigner" as "United States, Library of Congress"
 - Leave the "Status" as "used by assigner"
- "Contributor and role - Contribution" section
 - There are two "Associated agent" fields. Make them both blank
 - There are two "contributor role" fields. Leave them both as "contributor"
- "Title resource - Title entity" section
 - Make the "Main title" empty
- "Content type" field
 - Leave it as "Text"
- "Summary content - Summary" section
 - There are two "Summary Content" fields. Make them both empty
- "Subject" section
 - There are four "Subject" fields. Make them all empty
- "dcterms:isPartOf" section
 - Has one field "dcterms:isPartOf" with contents <http://id.loc.gov/resources/works>
 - Leave it as is
- "Instance of Work" section
 - It has one field "Instance of Work".
 - Leave the field and make it blank.

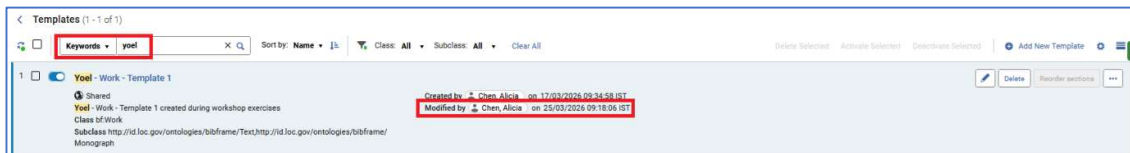
ELEVEN

On the top click "Save"



TWELVE

At "Resources > Cataloging > Manage BIBFRAME Templates" search for the template and see that it has been modified and saved



Exercise complete