

## 07 Create cataloging template for a BIBFRAME Instance based on existing Instance

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In this exercise we will edit a BIBFRAME Instance, 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”.

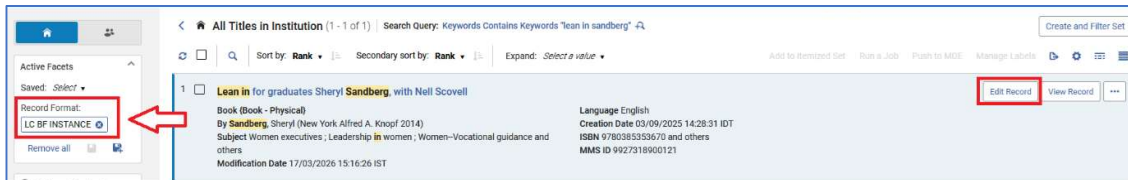
### ONE

Search for a BIBFRAME Instance which will be used as the basis for the new template. Use the “All Titles” repository search. You can use the Instance which we created in a previous exercise or any other Instance in the repository

You can either:

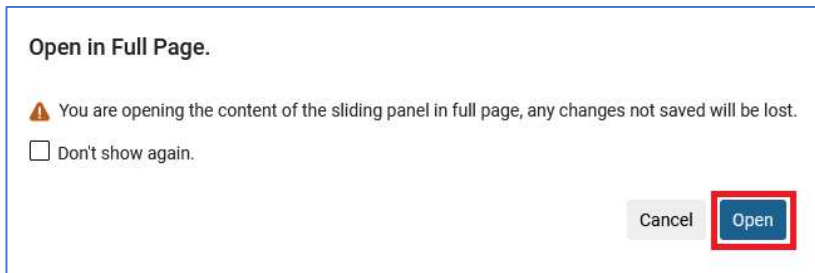
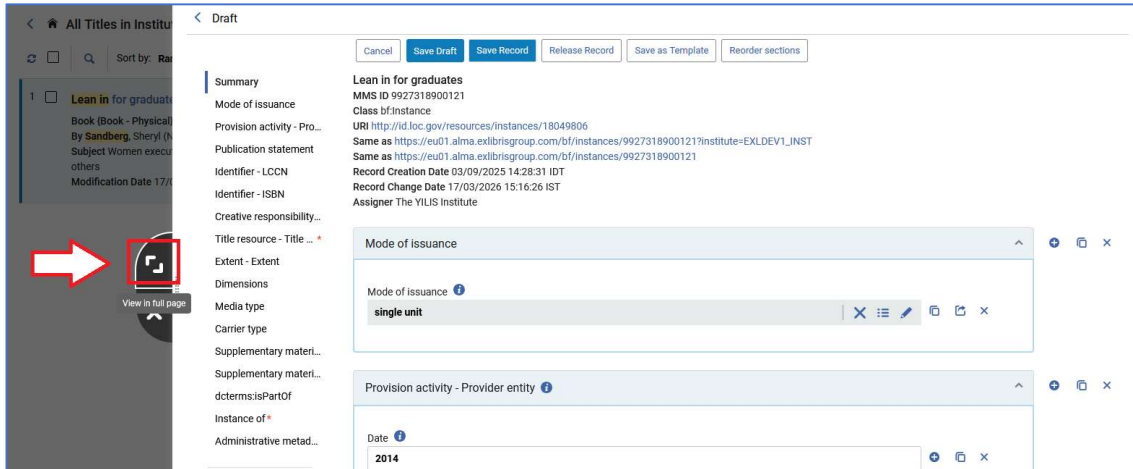
- A. Do an all titles simple search and then from the results facet by :LC BF INSTANCE
- B. Do an all titles advanced search which includes :LC BF INSTANNE

Upon locating the record click “Edit Record”.



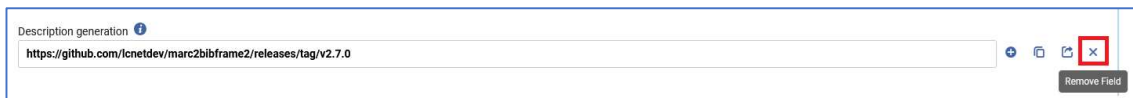
### TWO

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



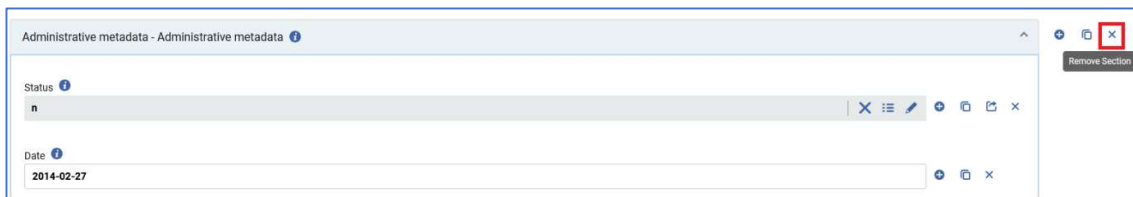
### THREE

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

Do as follows (you can do it differently if you want your template to be different than this example but it should at least be similar)

- Leave the field "Mode of issuance" with predefined value "single unit"

- In the section "Identifier - ISBN"
  - Leave one case of "rdf:value" and one case of "Qualifier" and make them both blank
  - Remove all other fields in this section
- In the section "Identifier - LCCN"
  - Leave one case of "identifier" and make it blank
- In the section "Provision activity - Provider entity"
  - Leave the following fields and make them blank
    - Date (bf:date)
    - Place (bf:place)
    - Agent bflc:simpleAgent
  - Remove all other fields in this section
- Leave the field "Publication statement" and make it blank
  
- Leave the field "Extent" and make it blank
- Leave the field "Dimensions" and make it blank
- Remove field "Creative responsibility statement"
  
- In the section "Title resource - Title entity"
  - Leave the field "Main title" and make it blank
  - Leave the field "Subtitle" and make it blank
- Leave the field "Media type" with value "unmediated"
- Leave the field "Carrier type" with value "volume"
- Leave one case of the field "Supplementary material" with value "Includes bibliographical references and index"
  - Remove additional cases of the field "Supplementary material"

## 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 is a navigation bar with buttons: "Cancel", "Save Draft", "Save Record", "Release Record", "Save as Template" (highlighted with a red box), and "Reorder sections". Below this is a summary table with the following data:

Summary	Lean in for graduates
Mode of issuance	MMS ID 9927318900121
Provision activity - Pro...	Class bf:instance
Publication statement	URI <a href="http://id.loc.gov/resources/instances/18049806">http://id.loc.gov/resources/instances/18049806</a>
Identifier - LCCN	Same as <a href="https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121?institute=EXLDEV1_INST">https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121?institute=EXLDEV1_INST</a>
Identifier - ISBN	Same as <a href="https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121">https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121</a>
Title resource - Title ...	Record Creation Date 03/09/2025 14:28:31 IDT
Extent - Extent	Record Change Date 17/03/2026 15:16:26 IST
Dimensions	Assigner The YILIS Institute
Media type	Mode of issuance
Carrier type	single unit
Supplementary materi	

- Give template name "[Your first name] - Instance - Template [number]"

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

**Save Template**

<p>Template Name*</p> <input style="width: 90%;" type="text" value="Yoel - Instance - Template 1"/>	<p>Template Description</p> <input style="width: 90%;" type="text" value="Yoel - Instance - Template 1 created during workshop exercises"/>
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Save Template with Record Content

Active  Private

Cancel
Save

✓

Template "Yoel - Instance - Template 1" was created successfully

✕

Collapse by default
 >

**SEVEN**

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

< Draft

Cancel
Save Draft
Save Record
Release Record
Save as Template
Reorder sections

<p><b>Summary</b></p> <p>Mode of issuance</p> <p>Provision activity - Pro...</p> <p>Publication statement</p> <p>Identifier - LCCN</p> <p>Identifier - ISBN</p> <p>Title resource - Title ... *</p>	<p><b>Lean in for graduates</b></p> <p>MMS ID 9927318900121</p> <p>Class bf:Instance</p> <p>URI <a href="http://id.loc.gov/resources/instances/18049806">http://id.loc.gov/resources/instances/18049806</a></p> <p>Same as <a href="https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121?institute=EXLDEV1_INST">https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121?institute=EXLDEV1_INST</a></p> <p>Same as <a href="https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121">https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121</a></p> <p>Record Creation Date 03/09/2025 14:28:31 IDT</p> <p>Record Change Date 17/03/2026 15:16:26 IST</p> <p>Assigner The YILIS Institute</p>
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**Draft**

Back

Save Record Release Record Save as Template Reorder sections

**Summary** Lean in for graduates  
 Mode of issuance MMS ID 9927318900121  
 Provision activity - Pro... Class bf:Instance  
 Publication statement URI <http://id.loc.gov/resources/instances/18049806>  
 Identifier - LCCN Same as [https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121?institute=EXLDEV1\\_INST](https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121?institute=EXLDEV1_INST)  
 Identifier - ISBN Same as <https://eu01.alma.exlibrisgroup.com/bf/instances/9927318900121>  
 Record Creation Date 03/09/2025 14:28:31 IDT  
 Record Change Date 17/03/2026 15:16:26 IST  
 Assigner The YILIS Institute

**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

Alma QA

Collection Development

Acquisitions

**Resources**

Cataloging

Open Metadata Editor

**Catalog BIBFRAME Records**

Manage BIBFRAME Templates

Search Resources

Browse Bibliographic Headings

Browse Authority Headings

Browse Shelf Listing

Authority Control Task List

Bibliographic Enrichment Review

Reminders

Catalog BIBFRAME Records (1 - 1 of 1)

Keywords [ ] Sort by: Draft Modification Date [ ] Class: All Subclass: All Clear All

Release Records of Another Cataloger Create New Record

Save Record Save and Release Record

1 Lean in for graduates (9927318900121)

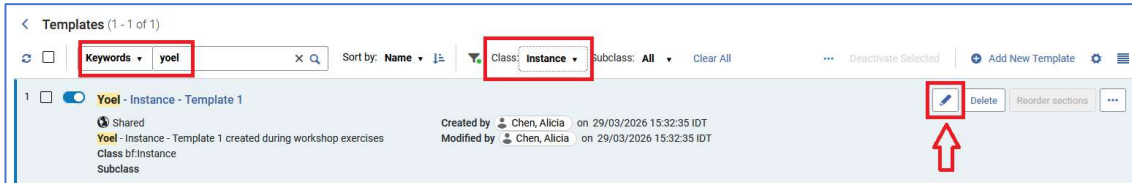
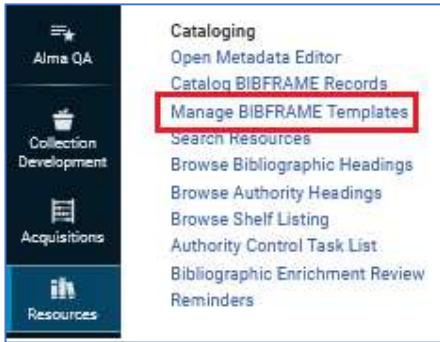
Class bf:instance Created by APL, Ex Libris on 03/09/2025 14:28:31 IDT  
 Subclass Modified by Chen, Alicia on 17/03/2026 15:16:26 IST  
 Draft Creation Date 03/29/2026 14:49:37 PM  
 Draft Modification Date 03/29/2026 14:49:39 PM

Release Record  
 Save as Template  
 View Work  
 Duplicate  
 Reorder sections

**NINE**

Edit the template

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



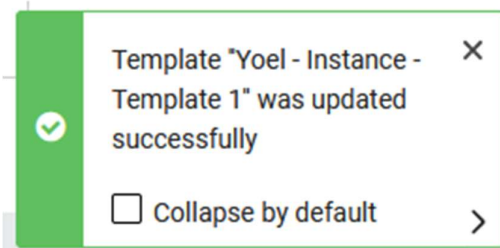
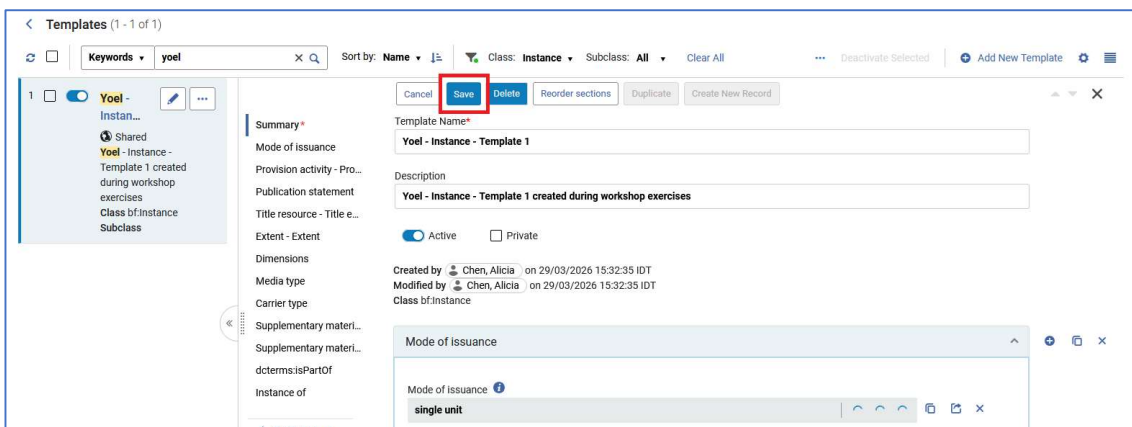
**TEN**

Continue editing the template

- Leave the field "dcterms:isPartOf" with default value <http://id.loc.gov/resources/instances>
- Leave the field "Instance of" and make it blank
  - Leave it as English
- Remove the section "Administrative data"

**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