



TEMPLATE RECORDS & BATCH UPLOADS

- Create template record
- Add batch of files

VITA 5
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Template Records & Batch Uploads

Template records and batch file uploading are available features for Plus and News plan subscribers.

1 Create template record

Templates can be used for batch uploads [image files only] or for individual file uploads [image, text, audio, video].

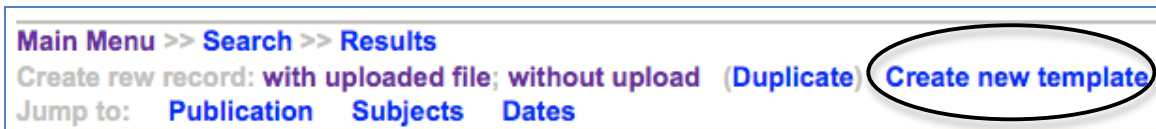
Use template records when the same information is needed for multiple files. The following fields will be duplicated using a template record:

Descriptive Data	Administrative data	Geographical data	Technical Data
Title	Collection	Place name	Operator
Creator name & role	Location of original	Latitude	Scanner
Description	Reproduction notes	Longitude	Software
Publisher	Custodial history	Zoom level	
Place & date of publication	Creative commons		
Media & Item Type(s)	Citation		
Inscriptions	Terms of use		
Language of item	Language of description		
Notes	Donor Private & Public		
Personal & Corporate names	[Copyright info] Status Date Holder Holder contact information		
Mystery question			
[Publication info] Publication ID Section Pagination			
[Dates] Date created Date of event			

Earliest year
Latest year
[Dimensions]
Width
Height
Length
Depth
Unit of measurement
Object width
Object height
Playing time
Map scale
Map projection

First, choose an existing record from your collection that has many or all of the elements you want to duplicate as a template.

Click the “Create new template” link in the navigation bar.



Your record will reappear in Template form, i.e. with a distinctive yellow background.

The image shows a form titled "Descriptive Data: Algomarine (id: 66253) Template". The form has a yellow background. It includes the following sections:

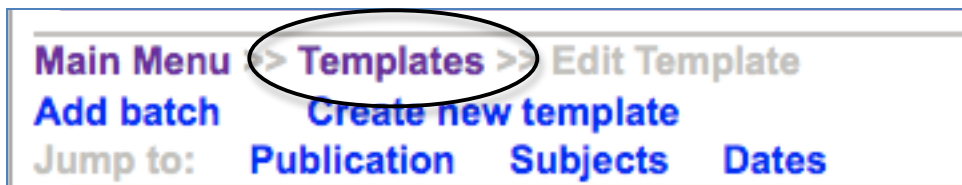
- Update Record** button and **No Comments** text.
- Template Title** field with a **Help** button.
- Public Display?** section with **Help** button and radio buttons for **Yes** and **No** (selected).
- Media Type** section with **Help** button and a dropdown menu.
- Image** section with a note: "This value determines a number of other options for this record. To change it [click here](#)."
- Secondary Media Types** section with **Help** button and checkboxes for **Text**, **Collection**, **Video**, **Object**, **Audio**, **Website**, **Publication**, **Genealogical Resource**, and **Newspaper**.
- Item Type** section with **Help** button and checkboxes for **Photographs** (checked), **Drawings**, **Maps**, **Paintings**, **Postcards**, **Prints**, and **Stereographs**.

Give your Template a title – something generic for general use or specific to a collection you plan to batch upload, for example.

Then, manage all the fields of the template by removing unique information and adding metadata that will be used for all the files uploaded to that Template. See the table above for fields that will be duplicated.

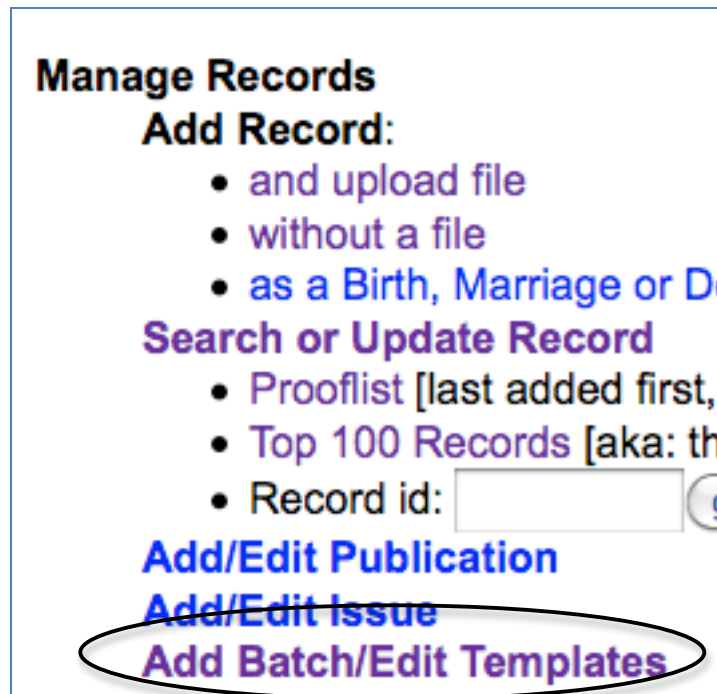
Remember: Template records are never made public and they are never indexed and so will not return if searched nor will they appear in your prooflist.

Update your Template at each metadata screen and click the “Templates” link in the navigation bar to add a batch of files using that Template.



2 Add batch of files

Link to your templates either from the template record (above) or the main menu:



Choose “Add batch” beside the appropriate template in the template list

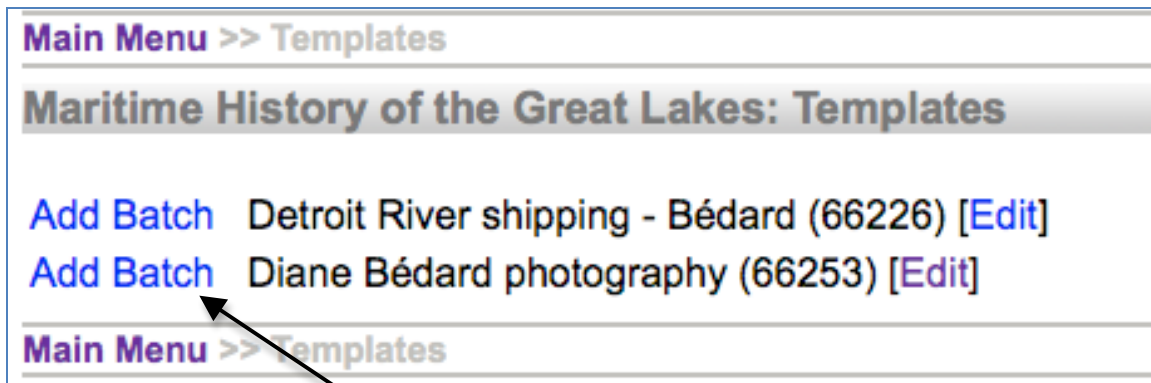
[Main Menu >> Templates](#)

Maritime History of the Great Lakes: Templates

[Add Batch](#) Detroit River shipping - Bédard (66226) [[Edit](#)]

[Add Batch](#) Diane Bédard photography (66253) [[Edit](#)]

[Main Menu >> Templates](#)




Select a display category for the files. Click “Add files” then use Ctrl or Command and click to select multiple files from your hard drive. Click “Start upload”. For more on multi-file uploads, see Managing Text Objects, Section 2.

[Main Menu >> Templates >> Add Batch](#)

Add Batch of records using "Eleanor Rigby Collection"

Only processes Images. Otherwise use "Add record and upload file".

Category: 

Image Resize: Yes No 

When the uploads are finished click the "Complete" button to advance to the next step.

When the file status bars all reach 100%, click the “complete” button.

You’ll be taken to a screen where thumbnails and a list of the batch records is actively generated “on the fly”. See the red screen note for a “patience” warning to wait until all the thumbs are generated and the link to your new batch appears at the bottom of the screen.


Note that all the items have received the same title with a unique number. This enables you to search for the records through the regular search screen in data management.

In this screen, click on the linked title to land on the record itself or click on the Batch link to batch manage the records.


[Main Menu](#) >> [Templates](#) >> [Add Batch](#) >> [Review new records](#)

Adding records based on this template: **Diane Bédard photography**


Depending on the number of images you submitted, the next step may take some time. We will put the thumbnails on screen as they are processed but don't move away from this page until the connection to the batch group appears at the bottom of the screen.



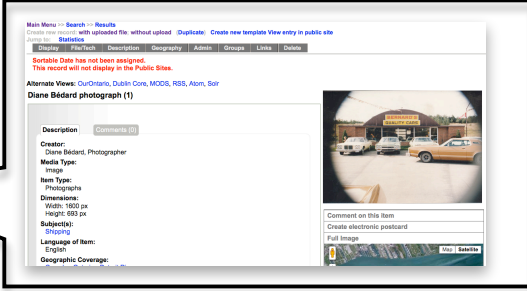
[Diane Bédard photograph \(1\)](#)



[Diane Bédard photograph \(2\)](#)



[Diane Bédard photograph \(3\)](#)



Connect to [Diane Bédard photograph \(Batch: 7 Nov 2011\)](#) [a private list for just this batch] to continue editing these new records.



Records assigned to "Diane Bédard photograph (Batch: 7 Nov 2011)"

This group is managed by **Maritime History of the Great Lakes**.

There are **3** records from your agency in this group.
To unassign records from this group, check the checkbox in the left column beside the appropriate record or click the "Select all records" button, and then click "Unassign selected records" button.

Your agency's records in this group

[Unassign selected records](#) [Select all records](#) [Unselect all records](#)

	<input type="checkbox"/>	Diane Bédard photograph (1)
	<input type="checkbox"/>	Diane Bédard photograph (2)
	<input type="checkbox"/>	Diane Bédard photograph (3)

[Unassign selected records](#) [Select all records](#) [Unselect all records](#)

You have successfully added a batch of records! Now you can customize the records according to their unique needs.