



UPDATED JULY 2022

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## INTRODUCTION

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

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.

## DUPLICATED FIELDS IN TEMPLATE RECORDS

The following fields will be duplicated using a template record:

Descriptive Data	Administrative Data	Geographic 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] StatusDate 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

## CREATE A NEW TEMPLATE RECORD

First, either choose an existing record from your collection that has many or all of the elements you want to duplicate as a template or create a new, generically populated record and turn it into a template (this “duplicates” the generic record, so you’ll want to delete the original after the Template is generated).

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



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

**Descriptive Data: Algomarine (id: 66253) Template**

No Files have been attached.  
This record will not display in the Public Sites.

Update Record

Template Title [Help](#)

Public Display? [Help](#)

☐ Yes ☒ No

Media Type [Help](#)

**Image**  
This value determines a number of other options for this record. To change it [click here](#).

Secondary Media Types [Help](#)

☐ Text ☐ Collection ☐ Video ☐ Object ☐ Audio ☐ Website ☐ Publication  
☐ Genealogical Resource ☐ Newspaper

Item Type [Help](#)

☒ Photographs ☐ Drawings ☐ Maps ☐ Paintings ☐ Postcards ☐ Prints  
☐ Stereographs

No Comments

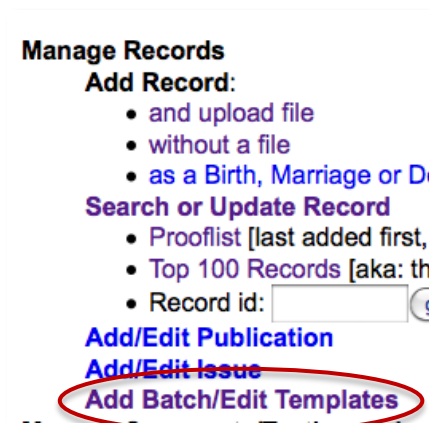
**Give your Template a title** – This is the title of your Template and only appears in your template drop down list when you add a new record and on the “Add batch/Edit templates” screen, so use something generic for general use or specific to a collection you plan to batch upload, e.g. “John Brown’s Photo Collection” or “Seaborn Collection”.

Then, manage all the fields of the template by only including metadata that will be used for **all** the files uploaded to that Template. See the table above for fields that will be duplicated.

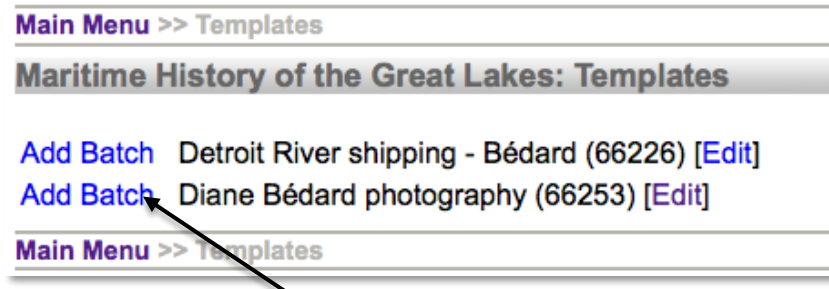
**Remember:** Template records are never made public and they are never indexed and so will not return if searched nor will they appear in your prooflist.

## ADD BATCH OF FILES

Open your templates list from the main menu



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



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 details about the batch file loader, see the Multipage Text or Newspaper Issue management manuals.

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 are generated "on the fly".

Wait until all the thumbs are generated and the link to your new batch appears at the bottom of the screen.


**Note:** All the items will 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.

All will also remain non-public until they are individually switched to Public.


[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.

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

You have successfully added a batch of records! Now you can customize the records with their unique metadata.