

## Starting from an ezEML Document Template

Research sites (e.g., LTER sites) and teams of researchers who are using ezEML may find that certain content is used repeatedly across a number of ezEML documents. Examples of such repeated content can include Creators, Contacts, Keywords, Intellectual Rights, Geographic Coverage, etc.

ezEML gives you the ability to create and publish one or more “templates” that can serve as a baseline starting point for documents created by members of your team. Such templates save users from having to re-enter a lot of information, and they facilitate metadata standardization. Since templates exist outside of any individual user’s ezEML account, they are accessible to everyone. In addition, everyone who accesses a template will get its current version, which helps alleviate problems arising from different versions residing in different users’ accounts.

### Using a Template

To create a new EML document from a template, select **New from Template...** from the EML Documents menu. This takes you to a page where you select the desired template. Templates are organized in a folder structure defined by their creators. The folder structure shown below is hypothetical, for demonstration purposes.

Let’s suppose that all templates are under a root folder called LTER. Then when you select **New from Template...** you will see a page that looks like this:

### New EML Document from a Template

Select a template:

 LTER

OK

Cancel

To expand the LTER folder, click its name (not the icon). This might bring up a page like:

## New EML Document from a Template

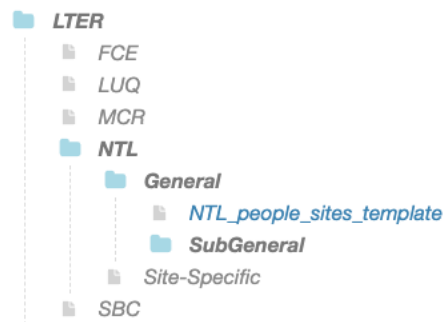
Select a template:



Clicking our way through the folder hierarchy in this way, we arrive at something like:

## New EML Document from a Template

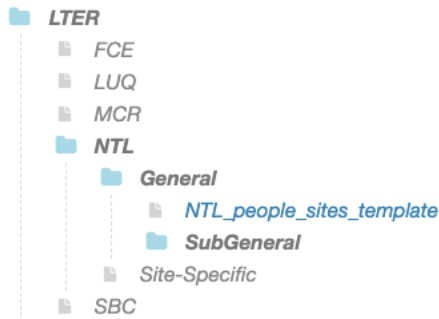
Select a template:



The item in blue, *NTL\_people\_sites\_template*, is the name of a template. Let's say that's the template we want. We click it and get:

## New EML Document from a Template

Select a template:



Selected: *NTL\_people\_sites\_template*

OK

Cancel

Now that we have selected a template, the **OK** button is activated. Clicking **OK** will take you to a page where you enter the name of the document you want to create from the template:

## New EML Document from a Template

Enter a name for the new document:

Document Name

Create

Cancel

Enter the name of the new document to be created and click **Create**. This creates the document, with the template information pre-entered. You can then proceed to edit it in the usual way. In particular, you can delete any items that were in the template that don't pertain to your specific dataset.

## Creating Templates

A template is an ordinary ezEML document. What makes it special is that it has been published as a template on the ezEML servers.

To create a template, simply create a new ezEML document and enter the desired metadata. Then use **Export ezEML Data Package...** in the Import/Export menu to export the package. Email the exported package to [support@edirepository.org](mailto:support@edirepository.org), with an explanation that you want the package to be published as a template and telling us its title and where in the template folder hierarchy you would like it to appear. We will handle getting it published on our servers.

Note that you can publish multiple templates for your site, if desired. You may, for example, have a subset of researchers who work with one particular set of geographic coverage areas and another subset who work with a different set of areas. You can create different templates for each case if you wish. Alternatively, you could define a more global template that includes elements that will not necessarily be needed by every user and leave it to users to delete the elements that do not apply to them. How you define your templates is up to you. If you define multiple templates, the folder structure lets you organize them in subfolders under your site's folder, if desired, although this is not necessary. I.e., all of your templates can reside in a single folder, or you can use subfolders. It's up to you.

You are not constrained by the folder structure that happens to exist when you submit a template. The folder structure is intended to evolve over time to fit the needs of the user community. Tell us where you want your template(s) to appear, and we will modify the folder structure as needed. So, in particular, in the hypothetical example shown above, the entire folder structure had LTER as its root. This was just for demonstration purposes. Your templates do not have to be related to LTER and can have their own root folder.

## Design Considerations for ezEML Templates

When designing an ezEML template (or a series of ezEML templates), consider who will use your template and which facets of EML are likely to remain constant among that user base. Some examples of ezEML template designs:

- A single template to be used for every dataset associated with a given project could, for example, pre-fill information regarding funding information, point-of-contact, principal investigator, intellectual rights, and keywords. Whenever a scientist needs to publish their data from that project, the information manager could refer them to the project's template.
- Multiple templates for a field station could be broken down based on the geographic location of the sites. For example, the Piedraraja Field Station could have one template for each of the three stream sensor sites that produce data. While all of these templates share project-wide information, they each have a different geographic coverage. The template that a data collector from this field station would use would depend on the location of their study.

An ezEML template is really just a partially filled ezEML document, and you have the freedom to design a suite of templates to best suit your organization's needs. Even a template that pre-fills only one or two fields can ensure that those fields, at least, are standardized across your organization. Finally, note that a data author can augment, delete, or overwrite pre-filled fields, as necessary. Consider developing lightweight documentation or how-to guides to inform your organization's data authors on the best way to utilize your templates.