

## 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 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. Everyone who accesses a template will get the 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

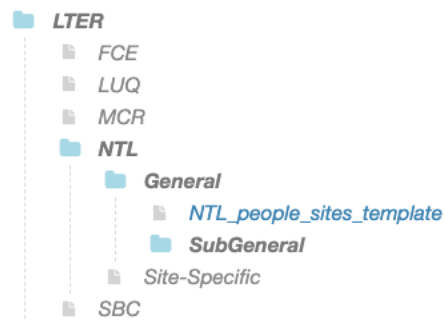
Select a template:



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

## New EML Document from a Template

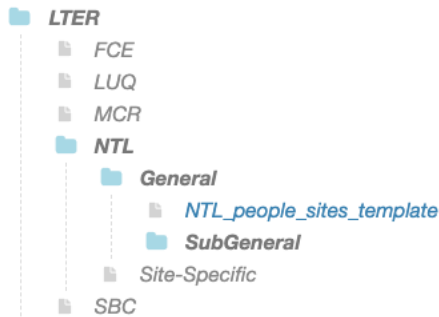
Select a template:



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@environmentaldatainitiative.org](mailto:support@environmentaldatainitiative.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 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.