

Exercises: Creating Templates

Creating a New Item Template

1. Use the File menu and select “New” or press **CTRL N**
2. Select “Item Template” and click **OK**
3. In the “Name” intake, enter “**TrainingNonFic**” + **your initials (eg TrainingNonFicDW)**
4. Use the dropdown menu for “**Template Owner**” to select your branch as the template owner
5. Select the “**Display in PAC**” check box to display this type of item in the public catalog
(Note you could also clear the Display in PAC check box to restrict display of this type of item to staff only.)
6. Since we want this type of item to circulate, leave the **Non-circulating** box unchecked.
7. Completing the rest of the workform:
 - a. Select your branch for this type of item’s owner in the Owner box, and for the assigned branch in the Assigned box.
 - b. Select your branch for this type of item’s assigned branch in the Assigned box.
 - c. Select Adult Nonfiction as the collection to which this type of item will be assigned in the Collection box.
 - d. Select an appropriate location for this type of item in the Shelf location box.
 - e. Select “In-process” as the circulation status for this type of item in the Circ status box.
 - f. Use the dropdown menus in Circulation Parameters, to select “Book” as material type
 - g. Review the rest of the choices in circulation parameters, then select appropriate options from the rest of the dropdown menus to complete this section.
8. Save the item template workform when done.

Create a new item template from an existing item template

1. Find your item template using the Find Tool (hint: the object you are looking for is “item templates”)
2. Display the item template you just created
3. From the File menu, select “New” or press **CTRL N**
4. Select “Copy existing workform ” and click **OK**
5. Change elements to make an Adult Fiction item template.
 - a. Change the name to “TrainingFic2” + your initials
6. Select a new branch as this type of item’s “owner” and “assigned” branch.
7. Save the new item template.
8. Display a list of all item templates in your system.

Creating a new bibliographic template for original cataloging

1. Use the File menu and select “New” or press **CTRL N**

2. Select "Bibliographic Template" and click **OK**
3. Put cursor after the leader and enter to create a new line.
4. Add 100 field with a subfield a <blank>
5. Add 245 field and other fields as desired remembering to include blank subfield a.
6. In the "Name" intake, enter "**TrainingOC**" + your initials (eg **TrainingOCDW**)
7. Use the dropdown menu for "**Template Owner**" to select your branch as the template owner
8. Save

Creating bibliographic templates from existing bibliographic records

1. In your collection find a bibliographic record for either a series or for library equipment. For example the bibliographic record for the any book in the series: "**No. 1 Ladies Detective Agency series**" - or – equipment (telescopes was used in training)
2. Save the record as a template:
 - a. File – *Save as template* (don't use Save icon)
 - b. Name it "1Ladies"+ your initials (eg 1LadiesLJP) or Equipment + initials
 - c. Select your branch as the owner
3. Edit the record to remove information specific to this title, but keep all relevant data for the series or equipment as a whole