

# Cloning and modifying templates

You can clone templates from any of the template folders.

Most of the templates you will need can be found in Megan's *All Shared Templates* and if you can't find it there, try the custom templates Sitka has created for us.

Under *Shared Folders*

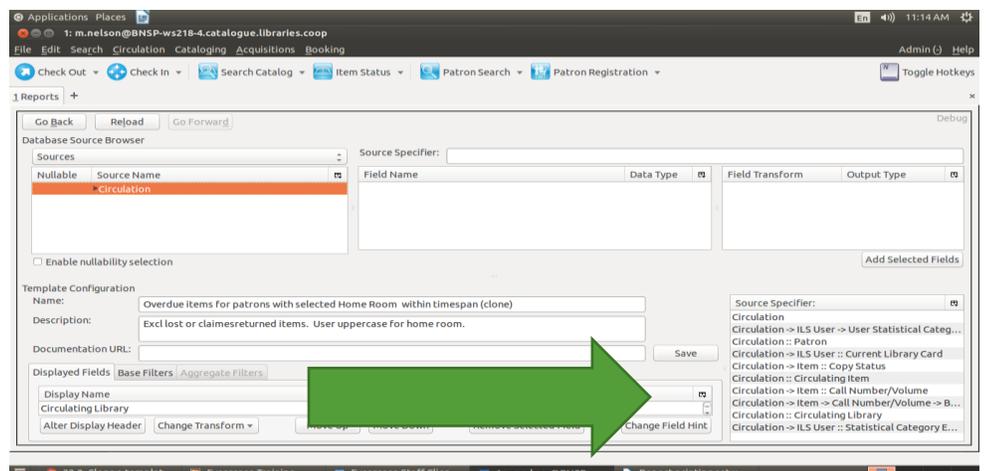
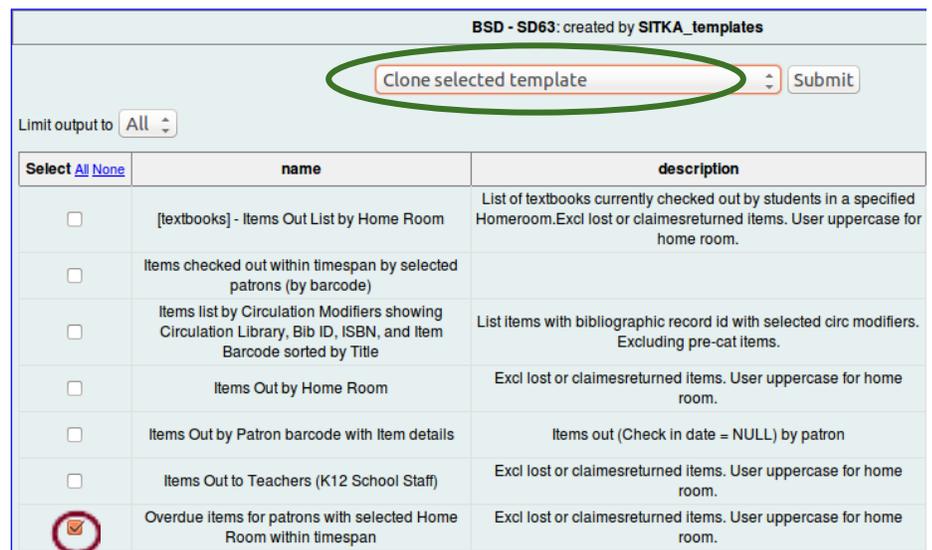
**click on the arrows beside *Templates* > *m.nelson***  
**then click on All Shared Templates (BSD)**

OR

**click on the arrows beside *Templates* > *Sitka Templates* > *Custom Templates (SITKA)***  
**then click on BSD – SD63 (BSD)**

## To clone a template:

1. Click in the box beside the template name to select it. (ex. *All Items out for whole school*)
2. From the drop-down menu at the top, select *Clone selected template*.
3. Click *Submit*
4. Click on the folder where you want to store the template – *Items Out*
5. Click *Select Folder*
6. A new window will open with an overview of your new template. You can change the name, add a description or modify the template (see *Modifying a template* below)
7. Click *Save*. Then click *OK* in the next two pop-up windows.



## Modifying a template

1. In the *Template Configuration* section, you can change the name of your template or update the description

The screenshot shows the 'Template Configuration' interface. At the top, there are three input fields: 'Name' (containing 'Items Out by Patron barcode with Item details (clone)'), 'Description' (containing 'Items out (Check in date = NULL) by patron'), and 'Documentation URL' (empty). A 'Save' button is located to the right of the 'Documentation URL' field. Below these fields are three tabs: 'Displayed Fields' (selected), 'Base Filters', and 'Aggregate Filters'. The 'Displayed Fields' tab contains a table with the following data:

Display Name	Data Type	Field Transform	
Student Barcode	text	Raw Data	FB

Below the table are several buttons: 'Alter Display Header', 'Change Transform' (with a dropdown arrow), 'Move Up', 'Move Down', 'Remove Selected Field', and 'Change Field Hint'. The 'Remove Selected Field' button is circled in green. The 'Save' button and the 'Displayed Fields' tab are also circled in green. The 'FB' icon in the table's rightmost column is also circled in green.

2. Click on *Displayed Fields* tab to see which fields will display in your report
  - Depending on your monitor display, this could be a very small area. Use the areas on the right side of the box to move up and down
3. To remove a field, click on the row to select it and click *Remove Selected Field*
4. The fields show in the order they appear in the report. Change the order by clicking on the row to select it and then click *Move Up* or *Move Down*