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 <u>All Shared Templates (BSD)</u>

OR

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

To clone a template:

- 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.



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Modifying a template

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

| Tem N | ame: | Items Out by Patron barcode with Item d | etails (clone) | | | | |
|-------------------------|---------------------|--|----------------|-----------------------|-------------------|--|--|
| D | escription: | Items out (Check in date = NULL) by patron | | | | | |
| Documentation URL: Save | | | | | | | |
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- 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*