Sierra -- Record Templates

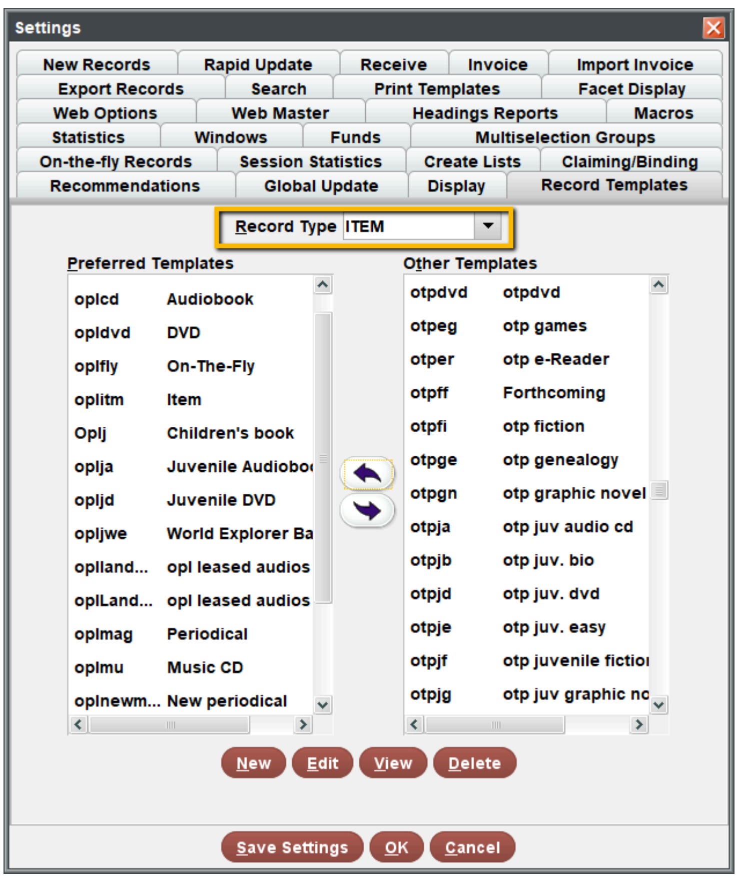
Updated 2023-03-07

Templates are used to create consistent looking records and to stream-line the record creation process. Once these templates are created and added to the users' preferred templates list, the user can then select a template from the list prompt when creating a new record for patron, item or bibliographic records. A staff member who has permissions may create, edit or delete templates by going to Admin in the File menu and selecting Settings. Then select the Record Templates tab.

Create a new record template

(Patron and Item Record Templates. See the next section for Bibliographic Record Templates.)

1. Go to **Admin**>**Settings**
2. Select the **Record Templates** tab.
3. Change the **Record Type** drop-down menu to the type of template you wish to create.



4. Then, select the **New** button.
5. Enter a short code beginning with your library code and 2-3 additional characters.
6. Enter a brief description that also starts with your library code.
7. Place your cursor in the fixed fields that you would like to prompt for information in the template that may change from record to record (eg. price, copy #, etc.).
8. Select the **Prompt** icon.
9. Update the fixed fields that are consistent in this type of record with the appropriate information (eg. location code to oplau, itype to 83, etc.).
10. To select fields to display in the variable field area of the template, click on **Insert**.
11. Choose the variable field you want to display and click **OK.**
12. If you would like it to prompt, place your cursor on that line and select **Prompt.**
13. Continue doing these steps until your template is complete.
14. Once done, click the **Save** and **Close** icons.
15. Click **Save Settings**. This saves your additions and updates permanently. Then click **OK**.
    ***Just clicking **OK** and **NOT Save Settings** will only save for the current session.

Creating a Bibliographic record template

From an existing bib record template

1. Go to **Admin**>**Settings**>**Record Templates**.
2. Change the **Record Type** drop-down menu to **Bibliographic**.
3. Select one of the **Gen####** records found in the **Other Templates** column. ***Minerva note: There are a number of pre-made Generic bib templates created to help jump start creating a specific template for your library.
4. Click **Edit** to open the template.
5. Click **Edit** >**Copy Template** in the upper navigation menu.
6. Enter the code (begins with your library's 3 letter code) and a description. Click **OK.**
7. The **Bibliographic template** with the new code will appear.
8. Modify the template as needed to apply to the format and criteria you need ensuring that the necessary fields to be a full record are left in the record.
9. Click **Save** and **Close** when finished.

From an existing bib record:

(Use a record that doesn't have a lot of libraries attached to make the process easier for you.)

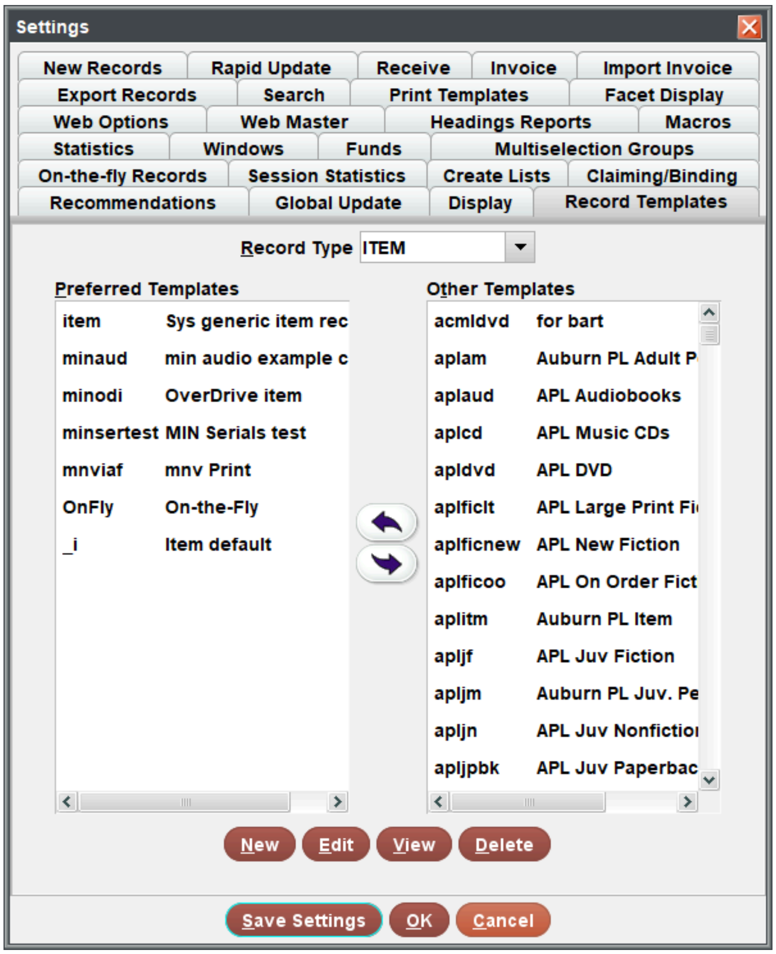
1. In the **Cataloging** function, navigate to an existing bibliographic record with the **Leader (LDR)** present.
2. Go to **Edit**>**Copy Template**.
3. Enter the code (begins with your library's 3 letter code) and a description. Click **OK.**
4. The new **Bibliographic template** will appear.
5. Modify the template to clear out all the information from the original record that pertains to a specific title and leave the necessary fields to be a full record.
6. Click **Save** and **Close** on the new template when finished.

7. The original template will still be open. Click **Close**.
8. Click **Save Settings**. This saves your additions and updates permanently. Then click **OK**. ***Just clicking **OK** and not **Save Settings** will only save for the current session.
9. The template will appear in the **Preferred Templates** column.

Copying an existing record template

Follow these directions for patron and item record templates only. Refer to the **Creating a Bibliographic record template** section above.

1. Go to **Admin**>**Settings**
2. Select the **Record Templates** tab
3. Change the **Record Type** drop-down menu to the type of template you wish to create.



4. Then, double-click an existing record template that you want to copy.
5. Select **Edit**>**Copy Template** in the navigation menu.
6. Enter a short code **beginning with your library's code** and 2-3 additional characters.
7. Enter a brief description...keep it consistent with your other descriptions.
8. Double-click the fixed fields that you would like to prompt for information in the template and make the necessary change. If the fixed-field is listed in the upper display box, then you don't need to set it to prompt. If it isn't listed then make sure your cursor is still in the correct field and click the **Prompt** icon.

9. Update the fixed fields that are consistent in this type of record with the appropriate information (eg. location code to oplau, itype to 83, etc.).
10. To insert or update variable fields:
    - To insert new fields to display in the variable field area of the template, click on Insert.
        - Choose the variable field you want to display and click **OK**.
        - If you would like it to prompt, place your cursor on that line and select **Prompt**.
    - If you want to delete any variable fields, simply place your cursor in the field and select Ctrl+d on your keyboard.
11. Continue doing these steps until your template is complete.
12. Click **Save** and **Close** on the new template when finished.
13. The original template will still be open. Click **Close**.
14. Click **Save Settings**. This saves your additions and updates permanently. Then click **OK**. ***Just clicking **OK** and not **Save Settings** will only save for the current session.
15. The template will appear in the **Preferred Templates** column.

Editing a template

1. Go to **Admin**>**Settings**.
2. Select the **Record Templates** tab.
3. Change the **Record Type** drop-down menu to the type of template you need to update.
4. Double-click the existing record template that you want to edit. Please only edit those for your library.
5. Go to the field to edit and double-click if it is a fixed-field, insert your cursor if it is a variable-field, or if you want to insert a new or additional field select the Insert icon and choose an option from the drop-down menu.
6. Click **Save** and then click **Close** when finished.
7. Click **Save Settings**. This saves your additions and updates permanently. Then click **OK**. ***Just clicking **OK** and not **Save Settings** will only save for the current session.

Adding or deleting a prompt in a template

Prompts appear when a record template is used to create a patron, item, or bibliographic record. These fields appear in the wizard to prompt staff to fill in the field. Adding or deleting a prompt in a record template consists of selecting the field and then clicking Prompt to toggle it on or off.

1. Select the fixed-length or variable-length field. Click **Prompt**.
2. Click **Save** and then click **Close** when finished.
3. Click **Save Settings**. This saves your additions and updates permanently. Then click **OK**. ***Just clicking **OK** and not **Save Settings** will only save for the current session.

Deleting a template

1. Go to **Admin**>**Settings**.
2. Select the **Record Templates** tab.

3. Change the **Record Type** drop-down menu to the type of template you wish to create.
4. Select the record template to delete and click the **Delete** button. ***Please only do this for your library's templates.
5. Click **Save Settings**. Then click **OK**.

Assigning a record template

1. Go to **Admin**>**Settings**.
2. Select the **Record Templates** tab.
3. Change the **Record Type** drop-down menu to the type of template you need to update.
4. In the **Other Templates** column, select the template you would like to assign to the login.
5. Click the left-arrow to add the record template to your list of templates. The template should now appear in the **Preferred Templates** column. Do this for all record templates you would like to assign to the login.
6. Click **Save Settings**. This saves your additions and updates permanently. Then click **OK**.
***Just clicking **OK** and not **Save Settings** will only save for the current session.