**Polaris CLIENT Cataloging**

**Adding an Item Template**

**Basic Information for adding item record templates in the Polaris Cataloging Client.**

1. After logging into the client, the new icon, go to File | New or Ctrl + N

 

1. In the New dialog box, select Item Template and click OK.

 

1. An empty item record displays. Enter the name of the template, It is recommending to use a naming convention where the name begins with your library’s 3 letter code such as SFD Archives.



1. Enter values you wish to be consistently applied when creating item records that fit the description for this template. For example, perhaps I wish to apply this template to every item I create that goes into the collection Archives. Those items have the same material type, same loan period, and same fine code. I can enter values into all of those fields, and then when I apply the template when creating new items, those values will automatically be entered into the record.



Fields that can be utilized in the template:

* Noncirculating check box
* Display in PAC check box
* Price
* Owner
* Assigned
* Collection
* Shelf location
* Material type
* Loan period
* Fine code
* Renewal limit
* Stat Code
* Call Number Scheme
* Loanable outside system
* Holdable
* Limited holds
1. Once values have been added, click the save icon, select File | Save or Ctrl + S to save the template.

 

1. When creating items either in the Client or in Leap, you are able to apply the template to populate information.

Client:



Leap:



1. To modify or delete a template, first search for the template in the client. In an item search, change the object to Item Templates, or select Cataloging | Templates | Item.



Once you find your template, double-click on it.

 

The template displays, and you are able to edit and re-save it. Alternatively, the template can be deleted by selecting the delete icon, going to File | Delete or Ctrl + D.

