# Creating a Template in M3 Cataloging

<u>**PURPOSE:**</u> To create or modify a template to meet your personal cataloging needs

1. Open **M3 CATALOGING** module
2. Click **File → New → Bibliographic Record**

Select the **Template** that's closest to what you want to work with. (**Here it's Serials**)

3. Click OK to open it.
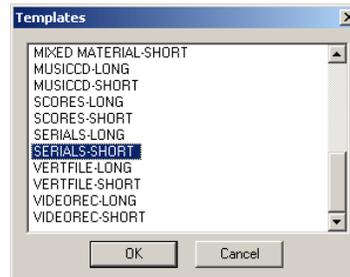
4. **Add** or **Delete** the **fields/subfields** to create the template you need.
   a. Right Click your **mouse** in the **MARC Field** area
   b. **Select** the option from the menu.
      **Note:** The subfields you have to choose from depends on what FIELD your cursor is in when you right click.
      (ex. To delete the **852** *subfield* i, Right Click on that subfield and choose your option(s) from the menu)

6. When you're finished editing the Fields and/or subfields you want in your Template:

   a. Click **File** on the menu bar

   b. Select **"Save As Template"**

   c. Name it
      ex. **"1 Brief Magazine"**

      The number one will place it at the top of the Template list so you won't have to scroll for it.

   d. Click **Save**
   e. When back at the template window, click the **CANCEL** button <u>unless</u> you're going to start creating a record right away. (If you click SAVE you will have a blank record)

**Repeat steps 1-6 for a** New Holding **to go with your new bibliographic template.**

**These templates will now be available in both Circulation and Cataloging if you want to create a brief record.**
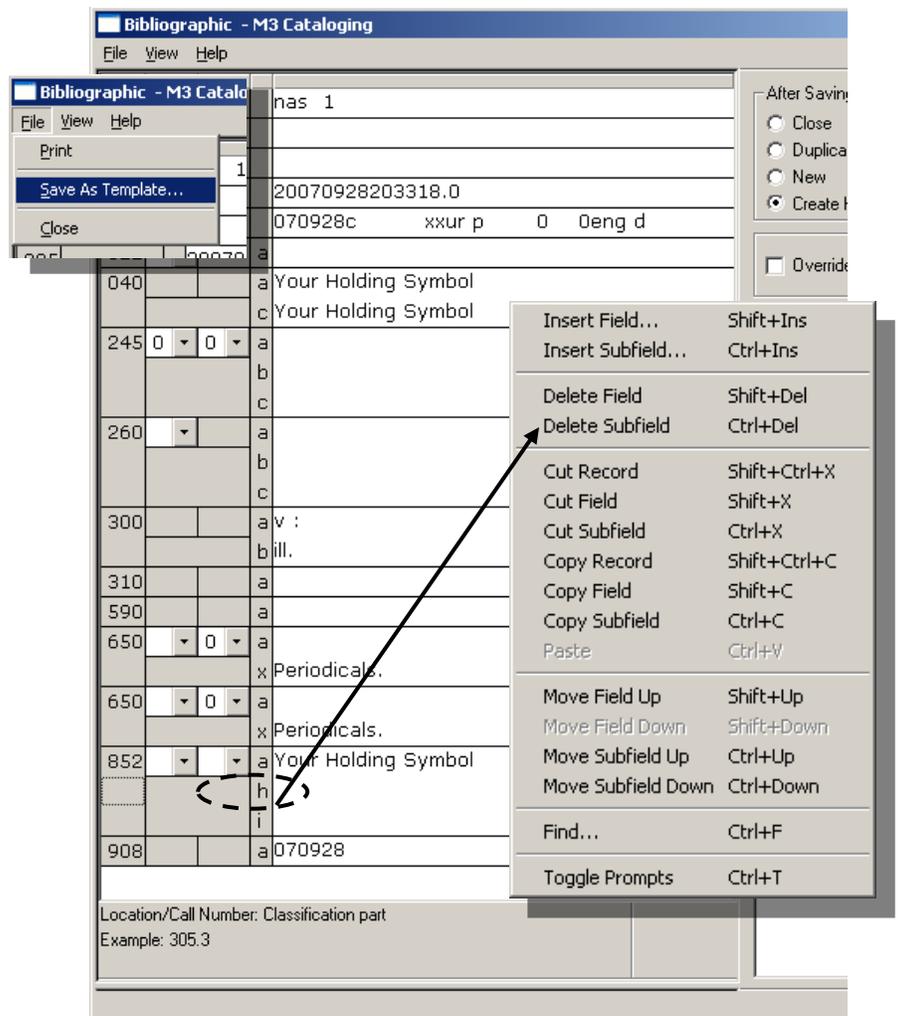
# How and Where to save Templates you download or copy to use in Mandarin

**IF YOU GET THE FILE(S) AS EMAIL ATTACHMENTS:**

**HOW** - Save them as you would any other file you receive via email (this may vary slightly between email packages so if you have NEVER saved a file to your computer from email please let me know)

**COPYING TEMPLATE(S) FROM ANOTHER MANDARIN COMPUTER**

**HOW** - Put them onto a flash drive, etc. to transfer but they'll still go in the same place.

**DOWNLOADING TEMPLATE(S) FROM A WEBSITE** – Click SAVE when given that Option

**WHERE THEY GO** – To the Mandarin folder <u>located within the Program Files folder</u>
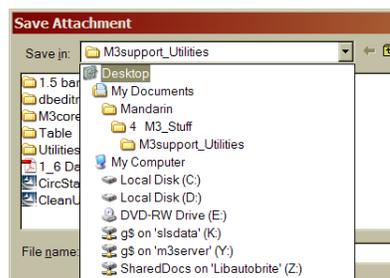


We'll assume here that you are saving the file(s) from your email or downloading from the SLS website and the SAVE ATTACHMENT or SAVE window is open:

1. Move to your Desktop
2. Double Click on **My Computer**
3. Double Click on **Local Disk (C:)**
4. Double Click on **Program Files** folder
5. If you see a **Mandarin Library Automation** folder, Double Click it.  Then Double Click on the **M3** folder
6. If you see a **Mandarin M3** folder, Double Click it.

Once inside the **Mandarin Application** folder



1. Double Click on **Templates (note the "s" at the end)**
   a. The **1-ILL IN** is a Bibliographic Template. Therefore,
   b. Double Click on **bibliographic** folder
   c. **1-ILL IN** should be listed in the File Name box
   d. Click the **SAVE** button

**If you're copying these from a flash drive** then drag the file from the flash drive into the correct folder.

Now go back to your email and repeat the steps for any other templates.

**\*\*Take note as to whether the template(s) are a *bibliographic* template, *holding* template or a *patron* template.   (Yes someone will have to specify it to you in the email) OR You need to make a note of where you got it from if you're copying it from another computer \*\***

That information will tell you which folder to open and save it in once you are inside the main **Templates** folder

**NOTE:** If you are not able to save files to your local hard drive, you will need to talk to your technology person to temporarily give you access to do this.  If this becomes a problem, please call the SLS office for assistance.