COBISS®

Co-operative Online Bibliographic System & Services

COBISS3/ Serials

V6.3-00

User Manual

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IZUM®

APPENDICES

TABLES

11.4   PREPARING AN ITEM TEMPLATE

When creating an acquisition document item, e.g. an order item, you can use item templates prepared in advance. By using an item template, the data on the apportionment of copies and funds is transferred to the acquisition document item.

An item template can be created in one of the following ways. You either

- create an item template, or
- copy the apportionment of copies and funds under any of the items to the item template

Each user can set up their own order of item templates.

11.4.1   Creating an item template

You can prepare item templates in the **Item template** class.

Procedure
1. Highlight the **Item template** class.

2. Select the **Class / New object** method.

   The **Item template** editor will open.

3. Define the template name.

4. Enter a note.

5. Enter the data about copies, funds and percentages of financing (see chapter ***Error! Reference source not found.***).

6. Save the data.

11.4.2   Copying an item to a template

You can save any acquisition document item, e.g. order item, invoice item, etc. as an item template.

Procedure
1. Find and select the acquisition document, e.g. an order.

2. Select the acquisition document item from the list of objects related to the acquisition document.

3. Select the **Object / Save as item template** method.

   A window will open, where you can enter the template name. After you enter it, click the **OK** button.

11.4.3 Sorting item templates

The order of item templates can be changed. Users can set up their own individual order of item templates.

Procedure

1. Highlight the **Item template** class.

2. Select the **Class / Sort item templates** method.

    The **Sorting item templates** window will open.

3. Highlight the item template.

4. If you wish to move the template up or down for several places, enter the number of places under »Number od places«.

5. To move the template up, click the **Up** button.

6. To move the template down, click the **Down** button.

7. Click the **OK** button.

The new order will be taken into account when selecting item templates in acquisition documents.