Edit, follow, or clone a license template

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Find information about editing, following, and cloning a license template.

Search for a template

To search for a template:

1. On the left side of the screen, expand Templates.
2. From the list, select the index to search:
   - **Template Name**: The name you entered when creating the template in License Manager
   - **Licensor**: The vendor from whom you are licensing the collection
   - **Collection**: The collection associated with the template you want to find
   - **Documents**: The documents (files or URLs) you added to the template you want to find
3. Type the search term in the search box.
4. Click Search or press <Enter>.
   - If the search results extend to two or more screens, use the navigation links (top and bottom of list) to move between screens. Screen headers and footers show your position within the list. For example: Results 11-20 of 56
   - Previous searches appear below the Search button. Click a search to return to it
5. On the Search results screen, click the Name of the template to access it.

Note: If no search criteria is entered, all results will be listed. To browse templates, leave the search box empty and click Search.

Filter results

Template results can be filtered by Licensor or by Type. Expand Filter by Licensor or Filter by Type and begin typing.

Columns in search results

Search results are sorted alphabetically by template name. To change the sort order, click any column heading.

- **Name**: The name you typed when creating the template in License Manager. Click the template Name to access the template
- **Paper clip icon**: The paper clip icon indicates attachments
- **Licensor**: The vendor from whom you are licensing the collection. Licensor is the only filter available for templates
- **Type**: Public or private
- **Action**: Create License. Click Create License to create a license from the template
Edit the license template

All fields of the template are editable except for the Template Type.

General

Fill out the general information for your template.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the template.</td>
</tr>
<tr>
<td>Licensor</td>
<td>Undefined until Collections are added. See Collections.</td>
</tr>
<tr>
<td>Type</td>
<td>Choose the type of template you are creating:</td>
</tr>
<tr>
<td></td>
<td>• Public: Available for all libraries to use</td>
</tr>
<tr>
<td></td>
<td>• Private: Only for use by your library.</td>
</tr>
<tr>
<td>Note:</td>
<td>This field will not be editable after you have saved the new template.</td>
</tr>
<tr>
<td>Description</td>
<td>Any description notes for the template.</td>
</tr>
</tbody>
</table>

Collections

Vendors group the titles libraries license into collections. The collections in the Collection Lookup list are stored in the WorldCat knowledge base.

Add collections to a template:

1. In the Collection Lookup list, type the collection you are looking for. Search results appear automatically when you stop typing.
2. In the search results, click **Collection Name**. The collection will then appear in the table to the right.
3. Optional: to edit the collection, click the **Collection Name** in the table. For more information, see the Collection Manager documentation page.

Once you have added the Collection(s), the **Licensor** value under the **General** tab will be updated to the provider of the collection(s).

Terms of Use (optional)

See **Terms of Use**.

Documents (optional)

Upload documents relevant to the template such as addendums, riders, notes, and so forth. To add a document:
1. Click **Choose File** and locate the file.
2. Click **Upload**.
   
   Documents cannot exceed 10 MB.

**Bookmarks (optional)**

Add links to documents relevant to the template such as addendums, riders, notes, and so forth. To add a link to a template:

1. Enter a URL into the text field. Supported URL protocols are: HTTP, HTTPS, and FTP.
2. Click **Add**.

**Comments (optional)**

Add Comments.

1. Click in the **Add Comment** box to add a comment about the template.
2. Click **Add**.

**History**

The History accordion will be available after a license is created. History provides details about changes to the template.

**Survey Data (trials)**

See [Trial license survey with response goal tracking](#).

Remember to click **Save** after altering any settings.

**Follow a template**

If you want to monitor public templates to ensure that edits continue to meet local needs, you can select the **Follow Template** option from the **Template Actions** drop-down. An email alert will then be sent if any edits occur on this template in the future.

The **History** accordion lists the changes that have occurred. After an edit to a template, libraries have the option to make additional changes or to clone the template as private and revert to the edits of a previous state.

**Clone a template**

If you would like to edit a public template for local use, you can use the **Clone as Private** option to copy an existing public template and edit as needed. This would allow you to retain any sensitive or private information pertinent to your institution.

1. From the template view, click on **Template Actions** and select **Clone as Private**.
2. You will receive a message stating that the template has been cloned and saved. Notice the **Type** is listed as Private.
3. From here, you can edit the template as necessary to reflect the needs of your institution.