Setup Instructions for Spine Label Template

Labels by Design: Creating Label Templates in WorkFlows’ Label Designer

To create a label template in the WorkFlows’ Label Designer, first select the Label Designer Wizard from the Cataloging Toolbar.

If templates have already been created and saved, a list will appear and the default label will be highlighted.

To create a new template, click the Add Template button. Rename the template (in this case, the name will be “Test 1 Label”) and click OK.
Once the template has been created and renamed, select it and click the **Modify** button.

A blank label template will display.

**Note:** If label specifications are not entered in the correct order error messages will appear.
Setup Instructions for Spine Label Template

#1

1. Setup **Page** configurations before attempting to add labels.
2. Choose to enter **Measurement Units** in either inches or centimeters.
3. Configure **Paper Size** based on selected labels. *(Note: This template is for a letter sized sheet of 1” x 1.5” spine labels.)*
4. Measure top and left **Margins**. *(Note: This measurement should be from the top or left edge of the sheet to where the label begins.)*

#2

1. Once again, setup **Label Set** configurations before attempting to add labels. *(Note: A Label Set may consist of 1 or more labels – (1 label) a single spine label, (2 labels) a spine and pocket label, etc...)*
2. Measure width and height and enter the **Dimensions** of the label set. *(Note: This measurement should be the exact size of the entire label set. This includes any internal right or bottom margins. *The actual label margins for each label will be set on the label specific **Label Tab**.)*
3. Enter the **Number** of label sets across and the number of label sets down.
4. Enter the number of **Label Sets per Item** that will need to be printed (i.e.: If only one spine label per item is needed, then enter 1. If two spine labels per item are needed, then enter 2).
Setup Instructions for Spine Label Template

#3
Click the Add Label button to add a label to the Label Set Preview. (Note: This process will be repeated, as necessary, to setup label sets with more than 1 label. Each label will have its own positions, dimensions, text margins, and font settings.)

#4

1. Enter the **Position** of the label in relation to the label set.
2. Measure the width and height of the label and enter the **Dimensions**.
3. Enter the horizontal and vertical **Text Margins**.
4. Click on the **Font** button and choose the font name and font size of the text.

*Note:* As mentioned previously, the **Add Label** function and **Label Tab** settings procedures will be repeated to add additional labels to the label set.
Setup Instructions for Spine Label Template

When a label is added, both a Line and an Element are automatically added. Additional lines and elements may be added manually to the Label Box by clicking either the Add Line button or the Add Element button. To Configure the Elements, select the correct line and choose the desired Type and Value from the drop down menus. (Note: The Value list will change depending on the Type selected.)

Note: This label will contain Call Number information only.

The designated Type will be Call/Copy and the Value will be Call Number.

When the Value is selected, it is automatically placed within the Element brackets.

Note: Each Line may have more than one “line.” This will be determined by the Maximum Number of Lines box. (i.e.: For a single call number label, 7 or more “lines” may be needed for the 1 Line/Element; however, for a pocket label only 1 “line” may be necessary for each Line/Element(s) added to the Label Box.)
Notice, when the **Maximum Number of Lines** box was changed from 1 to 8, the icon in the **Label Box** next to the **Line** changed from ![green check mark](icons/green_check_mark.png) to ![green check mark](icons/green_check_mark.png).  

A **“green check mark”** ![green check mark](icons/green_check_mark.png) indicates that all “line(s)” for the Line/Element(s) will definitely appear on the printed label.

A **“yellow arrow”** ![yellow arrow](icons/yellow_arrow.png) indicates that a “line” may or may not display on the printed label.

A **“red X”** ![red X](icons/red_x.png) indicates that a “line(s)” or Line/Element(s) will not display on the printed label.

When the **Value** is equal to the **Call Number**, the **Call Number Configure** button will be available. This function allows for configuring call number breaks.
The Call Number Configure box provides a list of options for prescribing breaks within the call number. Most options also allow for Specific Instances. (i.e.: Instead of breaking after Every Space, break after the “1st and 3rd spaces” [1, 3])

The Configure box also has a Test Box to view the results of the selected options.

If all specifications were measured accurately and entered properly, the picture in the Label Set Preview should resemble the intended label or label set. Click the Save button to retain the label template.
Example Settings for Spine/Pocket Labels

Page Settings:

Label Set Settings:

Note: The Width and the Height of the Label Set must include the width and height of the entire label set plus any internal label margins. (See examples of label sets)
Example Settings for Spine/Pocket Labels

Label #1 Settings:

Label #2 Settings:
Label #3 Settings:

Label Designer: Test 3 Label

- [ ] ID: Item ID
- [ ] Title: Number of Pieces
- [ ] For Reference Use Only

Current line Elements:
- Add element
- Delete element

Maximum number of lines: 1

Configure element
- Type: Text
- Value: ID
- Call number

Label Set Preview:
Total number of labels: 3

Label Number: 3

Positions
- Top: 0.81"
- Left: 0.87"

Dimensions
- Width: 2.56"
- Height: 0.62"

Text Margins
- Horizontal: 0.10"
- Vertical: 0.10"

Font name: Lucida Sans Unicode
Font size: 10

<table>
<thead>
<tr>
<th>Field</th>
<th>Subfield</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Save | Return to List | Close
Examples of Label Sets

Label Height
1.5” Label Width 1”
Outside margin .25” No internal margins

Label Height
1.64” Label Width 3.55” + .35” = 3.90”
Include internal margin
Outside margin .52

Single Spine Label
Label Set: 1 Label

Spine and Pocket/Card Labels
Label Set: 3 Labels
Under the Reports Wizard, choose Schedule New Reports.

Note: The final template will be saved under the Templates Tab.

Select the Bibliographic Tab and Setup & Schedule the Print Custom Labels Report.
Change any of the basic identification information for the report, as necessary, to better reflect the purpose of the report template. (e.g.: Change **Report Name**)

The **Item IDs** Tab should be left blank on the report template. When printing labels, each item's barcode (ID) will be scanned into the **Item IDs** Box.
The **Item Selection** Tab should be left blank on the report template.

The limiters in this section can be configured to print labels for items with specific Item Categories, Item Types, Locations, etc... or any combination without physically scanning the item IDs into the Item IDs Box.

**Note:** Care should be taken in selecting criteria in this manner. If the group selected is too large, the report will lock-up and LOUIS will have to terminate the report.

The **Call Number Selection** Tab should be left blank on the report template.

The limiters in this section can be configured to print labels for items in specific Call Number Ranges, Class Schemes, etc... or any combination without physically scanning the item IDs into the Item IDs Box.

**Note:** Care should be taken in selecting criteria in this manner. If the group selected is too large, the report will lock-up and LOUIS will have to terminate the report.
The Title Selection Tab should be left blank on the report template.

The limiters in this section can be configured to print labels for items with specific Creation Dates, Publication Years, etc… or any combination without physically scanning the item IDs into the Item IDs Box.

Note: Care should be taken in selecting criteria in this manner. If the group selected is too large, the report will lock-up and LOUIS will have to terminate the report.

The Sorting Tab allows for selecting the order of the printed labels. They can be sorted by Call Number, Item ID, or None (i.e.: scan order). This choice can be made for a specific template or selected when actually printing the labels.
All label templates should appear on the **Label Template** Tab. Once again, this choice can be made for a specific template or selected when actually printing the labels.

Click the **Save As Template** to save the configured report to the **Templates Tab** under the **Reports** Wizard.
In order to print individual labels for specific items, the appropriate default label must be selected. Click the **Label Designer** Wizard located on the **Cataloging** Toolbar.

Choose the appropriate label template and set it as the default by clicking **Default**.
Printing Individual Labels for Specific Items

The default will be displayed at the bottom of the **Label Templates** Box.

Then click **Close**.

Locate the correct item record.

**Note:** The **Print Label for Selected Item** feature will be available in most wizards (e.g.: **Modify Title, Call Number and Item Maintenance, Add Item**, etc…)

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Click on the Call Number/Item Tab and select the correct item call number or item ID.

**Note:** If there is more than one copy under a call number, then choosing the call number, rather than the item ID, will print a label for each copy.

Click the Select an Item to Print Preview Button.

**Note:** This is the first printer icon with the magnifying glass.
Printing Individual Labels for Specific Items

The label(s) will display and can be edited or manipulated before printing. To print the label(s), click the printer icon on the top, right-hand side of the Preview page.

Selecting the title rather than the call number or the item ID will print labels for all call number/items.
Printing Individual Labels for Specific Items

The label(s) will display and can be edited or manipulated before printing. To print the label(s), click the printer icon on the top, right-hand side of the Preview page.
Procedures for Printing Custom Spine Labels

Go to the Reports Wizard and choose Schedule New Reports.

The Defaults screen will come up for each new session. Settings can be adjusted as necessary. Then click OK.
The **Templates Tab** should be displayed first; however, if it is not, click on it to view the available report templates. Then, choose the appropriate Print Custom Labels Report template and click **Setup & Schedule**.

Make sure the appropriate template has been selected by checking the **Report Name** and the **Sorting Tab**. Then, choose the **Item IDs** Tab.
Procedures for Printing Custom Spine Labels

Select the **Item IDs** Tab, and click on the **Gadget**. Scan in item IDs one at a time indicating the correct number of labels needed for that particular item. The default is 1 or the number entered until it is changed (i.e.: if you want to print labels 2 for each item, then you only have to enter the number 2 once.)
Procedures for Printing Custom Spine Labels

When all items for the batch have been scanned, select the **Save** Button from the bottom of the Gadget Screen.

Choose the **Run Now** Button from the bottom of the screen.
Procedures for Printing Custom Spine Labels

When the confirmation screen appears, click the **Display Finished Reports** Button.

It may take the report a few minutes to run. To make sure the report is running, click the **Display Reports Scheduler Status** icon and then, **OK** to return to the Finished Reports display. To refresh the Finished Reports page when the report has finished running, click on the **Refresh Reports** icon to display the report.

*Once the report is finished running and is visible on the Finished Reports page, select the correct report and click the **View** Button at the bottom of the screen.*
Procedures for Printing Custom Spine Labels

When the View Finished Reports box is displayed, you may uncheck the View Log box if viewing the log is unnecessary (leave the View Result box checked) and click the OK Button. It may take a moment for the spine labels to display.

Once the labels are displayed, they can be manipulated one at a time within the Print Preview screen. To change, rearrange, or delete information within each label, simply select the label and click the Modifies the Selected Label icon.
Procedures for Printing Custom Spine Labels

In the **Modify Label** box, individual labels can be manipulated using the **Insert**, **Modify**, **Append**, and **Remove** Buttons.

- **Insert** will insert an additional line above the selected line.
- **Modify** will allow information to be changed within the selected line.
- **Append** will insert a line below the last line of the call number (not the line selected).
- **Remove** will remove the selected line.
- **OK** will save any changes and **Cancel** will ignore any changes.

To shift label sets from the first label on a sheet to a subsequent label on a partially used sheet (i.e.: to avoid wasting labels on previously used label sheets), select the appropriate beginning label, and click the **Start Printing at the Selected Label** icon.
Procedures for Printing Custom Spine Labels

The spine labels will be automatically shifted to the selected label. If more than 1 page of labels will be printed, the Page selector will become active.

Once the labels have been edited and/or shifted, as needed, insert the correct size labels and the adequate number of pages into the bypass of the printer and click the Printer icon.