

Creating a new Record Type

This page describes creating a new Record Type:

- [General settings](#)
- [Additional settings](#)
- [Content Type settings](#)
- [Defining the edit screen](#)
- [Defining the Citation reports](#)
- [Defining the RSS format](#)

To access Record Type Templates Maintenance, select **System Management > Database Configuration > Record Type Templates Maintenance**.

From the list of Record Types, click **Add a new type** in the Actions menu.

The following screen appears:

Record Type Template Maintenance Powered by *SoutronGLOBAL*

Language: English OPAC: Default Application Standard: Soutron

General Additional Reports

System Name Display Text Short Code Active Part

Description

Categories Cornwall Embargued

Content Type Fields Template

EUS	System Name	Display Text	Sys
<input type="checkbox"/>	Monograph	Printed Material	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Looseleaf	Looseleaf	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Serial	Serial	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Multimedia	Electronic media	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Technical Reports	Technical Reports	<input checked="" type="checkbox"/>

General settings

On the "General" tab, enter the following information (required fields have an asterisk next to the label):

System Name *	Name of the Record Type, eg DVD
Display Text	Display Text if this is to be different from the System Name
Short Code *	Unique short code - this can be the same as the System Name
Active	By default new Record Types are active - un-tick if not
Part	<p>Tick if this Record Type is to be a part of another Record Type, eg conference paper, book chapter. It is not necessary to specify which other Record Type it is a part of, as this is assigned at the time of creating the Part record.</p> <div style="border: 1px solid yellow; padding: 5px; margin-top: 10px;"> <p> Note that you cannot specify a Record Type as a Part once data has been added.</p> <p>Should you need to, please contact the Soutron Help Desk.</p> </div>
Description	Description of the Record Type if needed
Categories	
Allow amendments	Allows amendment functionality for selected record type.
Allow Link to Loan	Allows records connected to this record type to be linked to a loan using new function in new loan module. A Search suggestion group is also required.
Synchronize Record Type View template	If enabled the fields for this record type will be automatically generated and synchronized with the portal full display template. If not enabled new fields will need to be manually added to the portal full display template.

[Back to the top](#)

Additional settings

The "Additional" tab contains optional further settings, which apply to *all* records in this Record Type (although they can be overridden for individual records):

		Default						
No copies	Tick if this Record Type will generally not have any copy records associated with it - this is usually the case for Part records. You can override this for specific records when creating them.	Unticked						
Allow Loans and Requests	<p>Select Yes if these are to be allowed for this Record Type. The following options then appear:</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>Allow Loans and Requests <input type="radio"/> No <input checked="" type="radio"/> Yes</p> <p>Allow Loans & Requests including the maximum allowed <input checked="" type="checkbox"/></p> <p>Allow Photocopy Requests including the maximum allowed <input type="checkbox"/></p> <p>Allow Supply a Copy including the maximum allowed <input type="checkbox"/></p> </div> <p>See Requests and Reservations for an explanation of the types of request.</p> <p>Tick the required options. If you allow photocopy requests, the setting "Copyright Declaration Required" is automatically ticked, although this can be changed.</p> <div style="border: 1px solid #ffc107; padding: 5px; margin-top: 10px;"> <p> Note that for Parts records, the Copy Request option is not available.</p> </div>	No						
Search result templates	<p>This allows you to define a second line for each record in the search results (grid view only):</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>Search result templates</p> <table border="1"> <thead> <tr> <th>Template type</th> <th>Template</th> </tr> </thead> <tbody> <tr> <td>Details</td> <td></td> </tr> <tr> <td></td> <td>Search Result - Abstract</td> </tr> </tbody> </table> </div> <p>Click on the drop-down list to select the template.</p> <div style="border: 1px solid #ffc107; padding: 5px; margin-top: 10px;"> <p> You need to have defined the template BEFORE it can be selected here.</p> </div>	Template type	Template	Details			Search Result - Abstract	None
Template type	Template							
Details								
	Search Result - Abstract							

[Back to the top](#)

Content Type settings

EUS	System Name	Display Text	
<input type="checkbox"/>	Monograph	Printed Material	✓
<input type="checkbox"/>	Looseleaf	Looseleaf	✓
<input type="checkbox"/>	Serial	Serial	✓
<input type="checkbox"/>	Multimedia	Multimedia	✗
<input type="checkbox"/>	Enquiry	Enquiry	✗
<input type="checkbox"/>	Interlibrary Loans	Interlibrary Loans	✗

Select the associated Content Type

Select which [Content Type](#) the new Record Type belongs to, by ticking the relevant option.

If the Content Type does not already exist, the link can be made either later or when defining the Content Type.

Select if the end user can submit records for this Record Type (known as End User Submission)

With this option, you can allow OPAC users can submit records for inclusion in the catalogue. Tick the Content Type in the EUS column.

[View details of the full process](#)

[Back to the top](#)

Defining the field template (edit screen)

The Fields Template tab is where you define which of the application fields are to be used on the edit screen for this Record Type.

You cannot save the Record Type until this has been done.

When you click on this tab, the following screen opens:

Record Type Template Maintenance

Language: English OPAC: Default Application Standard: Soutron

System Name: DVD Display Text: Short Code: DVD Active: Part:

Description: Categories: Carnival Embargoes

Content Type	Field	Display Text	Field Type	Thesaurus/VL/VT	Def	Mandatory	EUS	Globalization	Single Entry	Public	See OPAC	Also Summary	Size	MultiLine
<input checked="" type="checkbox"/>	CID		Integer		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input checked="" type="checkbox"/>	Title		Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	Edit
<input type="checkbox"/>	Abstract		Rich Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input type="checkbox"/>	Alternative Title		Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	Edit
<input type="checkbox"/>	Attached Documents		File		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input type="checkbox"/>	Authors		Thesaurus	Authors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input type="checkbox"/>	Book Cover		Image		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input type="checkbox"/>	Catalogue Status		Dropdown List	Catalogue Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input type="checkbox"/>	Corporate Author		Thesaurus	Corporate Authors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input type="checkbox"/>	Created By		Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Edit
<input type="checkbox"/>	Created By Office		Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Edit
<input type="checkbox"/>	Created Date		Date		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input type="checkbox"/>	Document Number		Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Edit
<input type="checkbox"/>	Document Reference		Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Edit
<input type="checkbox"/>	Document Type		Integer		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input type="checkbox"/>	Edition		Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Edit
<input type="checkbox"/>	Editors		Thesaurus	Authors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	Edit
<input type="checkbox"/>	E-ISSN		Text		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Edit

At the top are displayed the fields which by default appear on all Record Type templates, ie CID and Title. Below these are all the other fields which have been defined in the application, in alphabetical order.

Adding fields to the template

To add fields to the template:

1. Scroll down and tick the box next to the fields you want
2. Click **Save** in the Actions menu. This brings all the selected fields up to the top, still in alphabetical order.
3. Now you can move the fields into the order you want, by selecting a field and then clicking on the **Move Up/Down** links in the Actions menu.



To display [book cover images](#) in the record, you need to include the *Book Cover* field in the Record Type template. When creating or editing a catalogue record, the *Book Cover* field does not appear until you have entered an ISBN number. You also need to define the settings in System Configuration > [Auto Cat & Image Settings](#).

To be able to create [volumes](#) for this type of record, you need to include the *Volumes* field in the Record Type template. You might also want to define a Record Type specifically for cataloguing volumes. The Volumes functionality can be enabled for all record types except Journals.

To allow [Reviews and Ratings](#) for this Record Type, you need to include the *Ratings* field somewhere in the Record Type template.

Changing field characteristics

You can also change some field characteristics from here, in a similar way to working in [Field Maintenance](#).

To edit the characteristics of a field:

1. Click **Edit** at the right-hand side of the table.
2. The field opens up:

3. Make the required changes

4. Here you can also:

- define different text for the field name, specific to this screen: enter the new text into the empty box
- specify that the field should appear on an [end user submission form](#) - tick the EUS box: note that you also need to ensure that the field is designated as Public

5. Click **Save** at the right-hand side of the table.

[Back to the top](#)

Defining the Citation reports

The Reports tab allows you to define the format for [citation reports](#).

Defining the RSS format

The RSS tab allows you to define the format for [RSS feeds](#).

Completing the process

When you have finished, click **Save & Close** in the Actions menu.

To exit the record template without saving, click **Cancel** in the Actions menu.

Either way, you will be returned to the list of Record Types.



If you have added a new Record Type to an existing Content Type, note that you need to add the new Record Type to the [security profile](#) of users if you want it to be visible to them.

[Back to the top](#)