

Submission of records by End Users via OPAC

This feature introduces the facility for end users to submit records for inclusion in the database. Typical uses of this would be submission of:

- electronic documents
- interlibrary loan requests
- literature search requests
- enquiries

Administrative staff are [notified](#) by email of each submission, and can then review the record to see whether it should be published in the database or not. Optionally, email templates can be set up to be sent to the user to tell the end user whether their record has been accepted or not.

Setting up the forms and emails

There are a number of steps required to implement this function. It requires System Administrator privileges and an understanding of the different areas that the application can be customised. If assistance is needed please consult the Help Desk.

These are:

1. [define which Record Types you will allow submissions for](#)
2. [define which fields are to be shown on the user's input form](#)
3. [define the library email address to which notification emails should be sent](#), for each OPAC
4. [enable the document submission link](#) on the menu bar for OPAC users
5. [set up templates and tasks for the emails](#)
6. for the [Access Permissions](#) for OPAC users, allow Edit on the Record Type(s)
7. in [OPAC Maintenance](#), specify which Access Permissions apply for the Guest and Named OPAC users

Managing the submissions

Once a record has been submitted by an end user, administrative staff will receive an email containing a link to the submitted record (as per item 3 above). Deciding whether to [accept or reject the record](#) is the final part of this process.

Records waiting for approval are not published in the database and therefore are not seen by end users and are excluded from search results presented to end users.