

Creating Amendments

Amendments is a special database relationship that is designed to manage **Loose Leaf updates** (common in legal information management circles) or parts of a main work that are received and update the main work. Typically this relationship type (Amendments is sometimes called "Child Records") is used for creating Archival Records and for managing Loose Leaf Updates.

The structure and set up of the database is applied by the System Administrator. To discuss how best to use and implement this functionality, please consult with the Soutron Help Desk.



The word "Amendment" and all its associated messages can be changed in System Management ([Resource String Translations](#)).

Main Work

A record is created in the database that describes the main work. This uses the standard record creation function described in the cataloguing or data entry sections.

There may also be Volumes created if the work has multiple volumes and there is a need to manage physical copies. These can be created and managed using the standard functionality to issue items to End Users for loans etc.

The "Create Amendments" menu function is needed to create Child Records of the parent or master record. This appears in a side menu when Amendments have been turned on in the Record Type template.

Record Type Template Maintenance

To use and apply the Amendments relationship, it is necessary to first set this in place for the Record Type template to be used. This is found in **System Management > Database Configuration > Record Type Template Maintenance**.

"Edit" the Record Type. Look to see if the "Allow Amendments" box (highlighted in red below) has been ticked.

It must be ticked for the function "Create new Amendment" link to appear in the Actions menu when entering data in the application.

The Main Record of the work that is to be set up with Loose Leafs as Amendments is displayed (in view mode not edit).

The Actions side menu (to the left of the record) displays a menu "Create new amendment".



Note: once an amendment has been created, "View amendments" will be displayed as an additional menu function. The **x** denotes the number of amendments created.

Click on "Create new amendment"

The application displays the Content Type and Record Type options to select to record the Amendment's details

IMPORTANT Ensure the 'Serial' function radio button is selected; this default can be set up in Record Type Maintenance.

It is strongly recommended that a new Content Type such as "Loose Leaf Updates" is created. This will allow control over the data and fields seen in the Search Results form. Doing this will show all the updates in one place.

It is also suggested that two record types within this Content Type (Loose Leaf Updates) are created:

- one for Annual Subscriptions
- one for PAYG (pay as you go) Subscriptions

This will make it possible to automate the allocation of fund accounts.

Click "Create" and the form will display with the fields ready to capture the necessary data.

Enter the Title of the main work and then in brackets put the word Updates so that you can easily identify it.

There is a facility that the System Administrator can apply to inherit the title of the Main Work so that this text is copied automatically when the record is created. If this is done there is only a need to override the text entry of title and add (Updates) to the end of the title.

Complete the necessary data entry.

Click **Save and Close** The new record will be displayed.

This concludes setting up the first part of the process to create an efficient workflow to manage Loose Leafs. Each new amendment can be recorded in this way and received into the department.

Creating Orders and Setting up Predictions for Receipt of Updates

The process to receive Loose Leaf items into a Library Service is similar to any Serial (Journal). In 2018 Soutron introduced a new user interface and workflows to streamline the processes associated with the management of Serials. What is depicted below is the OLD system which some clients are still using. The new processes have a different menu system and forms interface. The Help Guides for this new functionality is in the process of being written. There will also be a series of mini-videos to guide staff through the new processes. For immediate assistance please call the Help Desk

Select the menu option to view the Serials Management Control Centre (SMCC).

IMPORTANT The menu option SMCC is not available for versions 4.1.1 and above where new functionality is implemented and uses the menu option "**Create Order**" or "**Add to Order**"

The old process follows a prescribed number of steps:

1. Set up of Frequency
2. Creation of Subscription
3. Auto-Assignment of Fund Accounts
4. Check-In (Receipting)

"Assign New Frequency" defines when updates are to be expected to be received into the department. The "Irregular" option can be chosen instead so that items can be received as they arrive.

The creation of a subscription for the Updates is the next step. Ensuring that the same locations that are set up for the main work are applied.



Note: Where the Find Accounts for Updates (PAYG and Subscription) have been created, and have been linked to the Content and Record Type, these Fund Accounts will be automatically populated, thus providing a detailed breakdown of charges for different locations .

Check in updates as they are received using the Check-In process

The end result will be the record of each Loose Leaf Update will show those updates that have been received and the locations that they have been received into (important if only part received).

The parent record will look like this:

Denying Access

Some organisations may not wish to publish the Updates Records to End Users. These can be hidden so that the Amendment Records are prevented from being searched by default. This is a setting in the OPAC Maintenance function. There are two options under the Options tab in OPAC Maintenance.

Include Dependant records by Default: - If selected 'Yes', this will ensure that, if the access permissions allow access to the relevant Content and Record Types, then the search will include the records.

Show Include Dependant Records Checkbox: - If selected 'Yes', this checkbox will be added to the All Fields search section options on the main search page.



Note: Change the text "Include Dependant Records" to a preferred description in **System Management > Resource String Translations** for different languages. Select this entry then click on Edit.

Access Permissions

Use the Access Permissions Maintenance function to remove access to the Loose Leaf Updates (or whatever has been used as a description) Content Type and Record Types. This will also prevent the End User from seeing Updates. Only the Main Record will be displayed thereafter to the End User.

Set-up of Record Type of Amendment

The Record Type created for the Amendments will be used to manage the Loose Leaf Updates. Be aware of the following three settings applied via:

System Management > Database Configuration > Record Type Template Maintenance.

Function Type

1. Highlighted in Black in the screenshot below is the Function Type. This must be set to "Serial".
2. Highlighted in Blue is the Title field. To change the Display text so it shows "Title of the Update", Highlight this field then edit it using the option on the far right of the table to open the Input box into which you can type an alternative Description for the field.
3. Highlighted in Red is a field called "Parent Title". This is a Text Field that has been created and assigned to the Record Template. To the right of the table entry for this field is a column called *Expression*. Select EDIT mode. In the Expression column, select "Parent Record" from the first drop down box. Alongside it, in a second drop down box, a list of fields are available to select from. Select the field that is to be copied from the parent record into this field (probably Title).



Note: The functionality to inherit values from parent fields is common to other Record Types and is not specific to this type of record