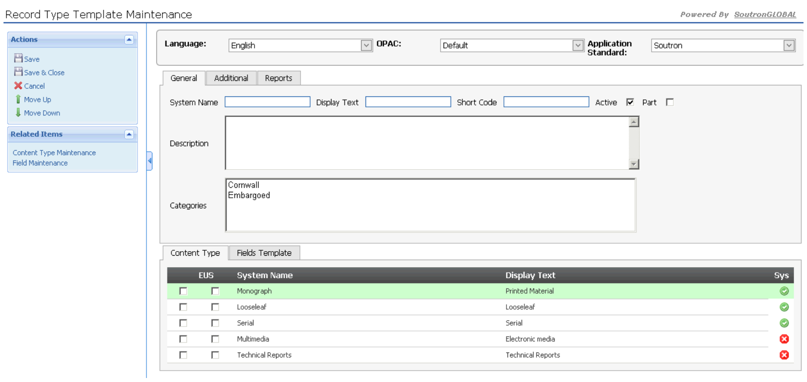
Creating a new Record Type

This page describes creating a new Record Type:

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:



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	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. Note that you cannot specify a Record Type as a Part once data has been added. Should you need to, please contact the Soutron Help Desk.
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.

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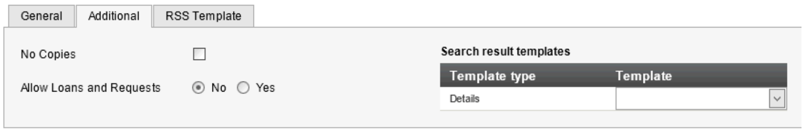
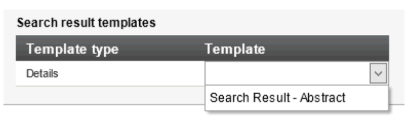
Additional settings

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	Select Yes if these are to be allowed for this Record Type. The following options then appear:  See Requests and Reservations for an explanation of the types of request. Tick the required options. If you allow photocopy requests, the setting "Copyright Declaration Required" is automatically ticked, although this can be changed. Note that for Parts records, the Copy Request option is not available.	No
Search result templates	This allows you to define a second line for each record in the search results (grid view only):  Click on the drop-down list to select the template. You need to have defined the template BEFORE it can be selected here.	None

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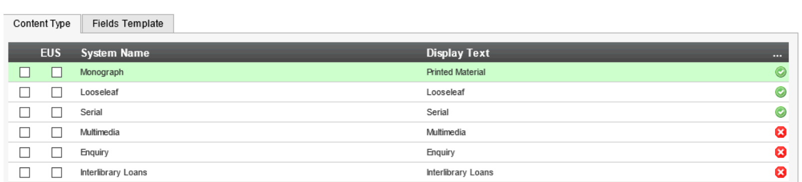
Content Type settings



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

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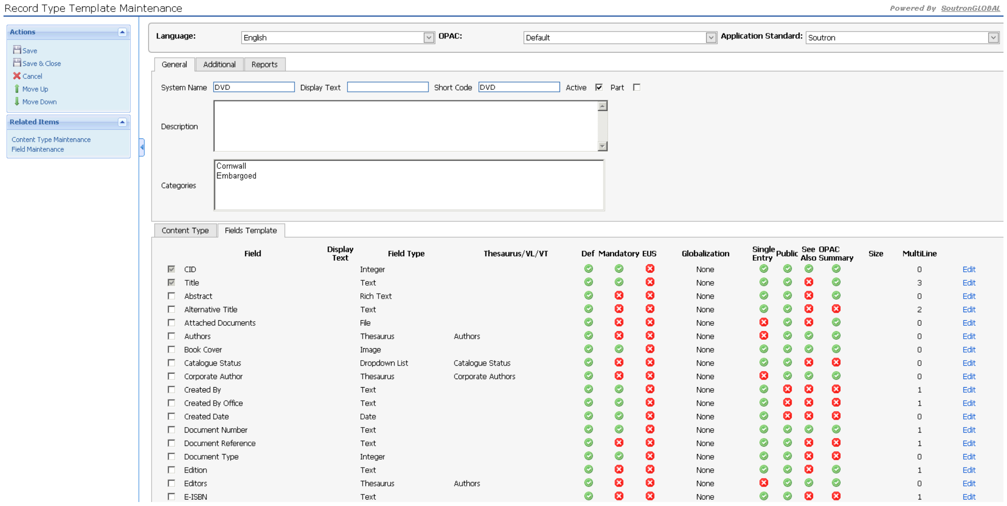
Defining the field template (edit screen)

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:



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 (old).

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.

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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.

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