3.1   BROWSER

The browser is the main component of the COBISS3 user interface. It enables access to COBISS3 modules, classes within the modules and individual objects. Within the classes and objects, you can perform basic methods and methods, which enable business transactions.

Browser elements:

- title bar
- menu bar
- toolbar
- main part of browser window
- status bar

The main part of the browser window is divided into six parts:

- modules and classes
- workspace
- attributes in selected class
- related objects
- queries
- shortcuts

The edges of the windows and their parts are enclosed by borders, which can be used to change their size (see Appendix *A.2*).
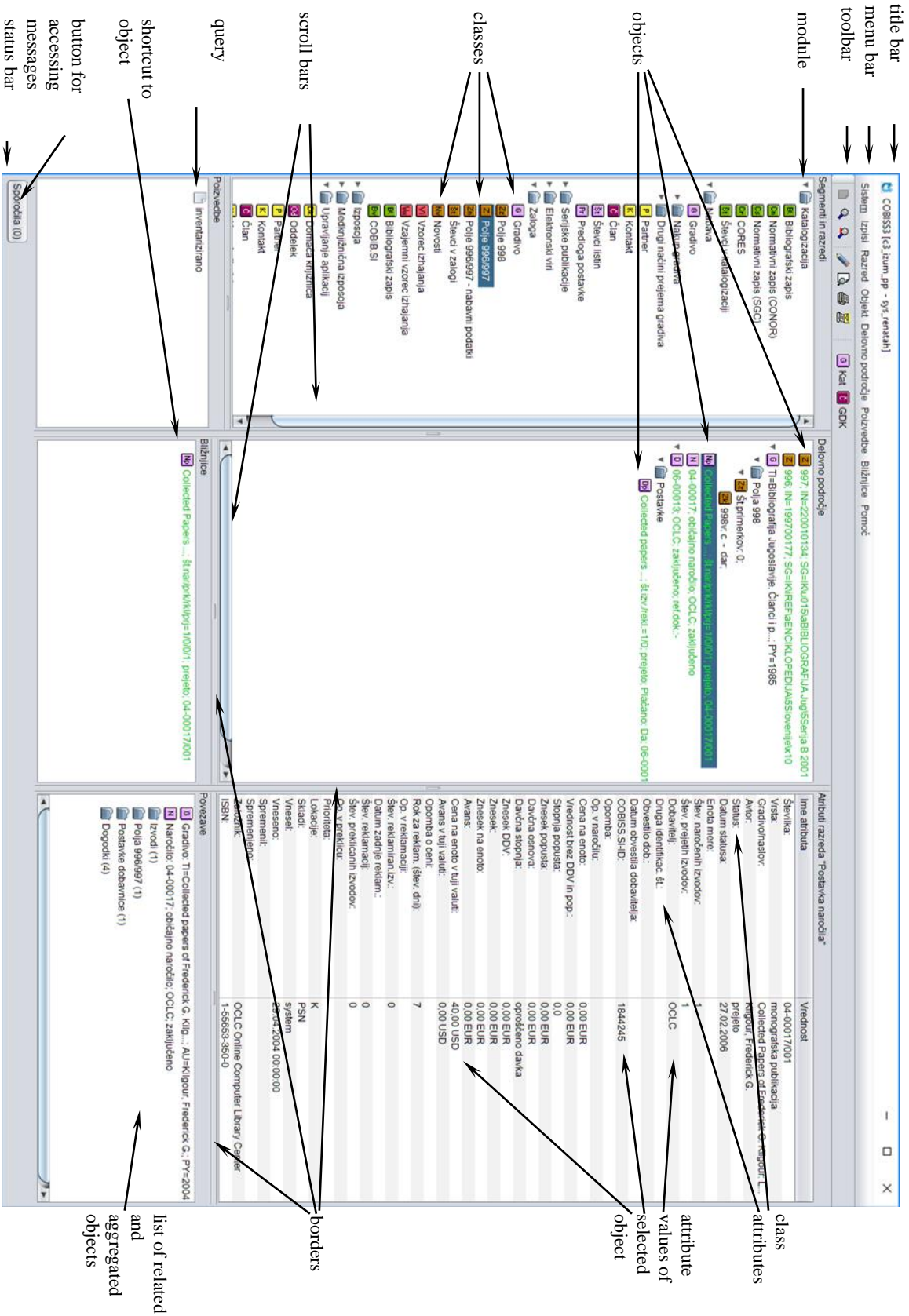
Figure 3.1-1: Browser

3.1.1   Title bar

The bar on the top edge of the window, which displays the COBISS3 software icon and its name. The database and your username, which you used to log in to COBISS3 are displayed in brackets.

For libraries where loan is organised in separate departments, the name of the department, where the user with the privilege to work in the COBISS3/Loan software module is currently logged in, will be displayed next to the name of the database. If the user has no privilege to work in the COBISS3/Loan software module, the name of the department will not be displayed.

3.1.2   Menu bar

The bar below the title bar, which consists of seven menus. Each menu contains several methods, which you use to perform certain functions. The groups of methods are separated by lines.

The content of the menu bar cannot be changed.

General methods (e.g. editing local code lists, editing queues, editing jobs) are available in the first part of the **System** menu and the other methods are combined into the following three sections: **Settings** (methods for editing settings), **Messages** (methods for viewing messages) and **Server** (methods server events). At the end, there is a method for logging out of the software.

In the **Class** menu, the methods are divided into two groups. The first group contains methods, which can be selected for every class (e.g. search for object), the other group contains methods which enable business transactions and change dynamically within the menu depending on which class you select.

The **Reports** menu contains methods that enable opening the COBISS3/Reports software module, preparing bibliographies and lists of subject headings and accessing the tool for data export.

The **Object** menu also comprises two groups of methods. The methods in the first group can be selected for every object, while the methods in the second group enable business transactions and change dynamically within the menu depending on which object you select.

The **Workspace** menu contains methods for removing objects from the workspace and refreshing object lists in the workspace.

The **Queries** menu includes a method for object searching according to pre-prepared and pre-saved search criteria, which make up a query. It also contains methods for renaming and deleting queries.

The **Shortcuts** menu includes methods for using, renaming and deleting object shortcuts as well as methods for viewing objects.

The **Help** menu enables access to the contents of all manuals and the "About COBISS3" page.

3.1.2.1   Menu properties

The names of those methods, which cannot be performed at the time, will be greyed-out.

The arrow (▶) on the right side of a method name means that this method will open a submenu. To open it, point the mouse pointer to the method name.

If the method name is followed by a key name or a key combination, the method can also be performed by pressing the appropriate keys on the keyboard. The list of keys and key combinations, also known as shortcuts or hotkeys, can be found in Appendix B (see *Table B-1*).

> Note:
>
> *Keyboard shortcuts (hotkeys) are not the same as object shortcuts (see chapter 3.1.9)!*

3.1.2.2   Selecting methods within menus

To perform methods when using COBISS3 software, select the desired method from one of the drop-down lists in the menu bar.

Procedure
1. To open a menu, click on its name in the menu bar.

   If one menu is already open, you can open another one in two different ways:

   - point the mouse pointer to the desired menu in the menu bar
   - select the desired menu by using the arrow keys <left>, <right>

> Tip:
>
> The menu bar can also be activated by pressing <Alt> + <M>, which will open the first menu in the menu bar. To open the other menus, use the arrow keys <left>, <right>.

2. Select the desired method. This can be done in two different ways:

   - point the mouse pointer to the desired method and click on it
   - select the desired method by using the arrow keys <up>, <down> and press <Enter>

> Example:
>
> The instruction "Select the **Class / New Object** method" means the following:
>
> 1. Open the **Class** menu.
> 2. Select the **New Object** method.

Depending on the position and the selection in the browser, only those methods are active, which can be selected and performed, while the inactive methods are greyed-out.

Most methods can only be selected after you have chosen a class, object, query or shortcut. You can *select* an individual *element* by pointing the mouse pointer to the element's icon or name and then click on it. The element will become highlighted. You can select an individual class, object, shortcut or query or even more objects at once. If you select more objects at the same time, only those methods will be active, which are common to all the selected objects.

Options

You can perform some methods by pressing a key or a key combination without having to activate the menu bar and selecting a method from the menu. For such methods, the menu also contains the corresponding key combination for the desired method (see *Table B-1*).

3.1.2.3   Context menus

Methods for class, object, query and shortcut can also be performed by using context menus. A context menu is the same as a drop-down list in the menu bar.

To open the context menu, select an individual element (e.g. object, class, etc.) and click the right mouse button. You can select the method from the menu in two different ways:

- point the mouse pointer to the desired method and click on it
- select the desired method by using the arrow keys <up>, <down> and press <Enter>

3.1.2.4   Help

Descriptions of procedures can be found in the electronic versions of the software manuals that can be found on the **Training** portal. To access them, go to the **Help** menu and select *COBISS e-manuals*. A page of the portal will open in a new window, where you can select the desires software manual and browse through its contents. To exit the portal, click the **Logoff** button.

Tooltips can also be very helpful while you work. Tooltips are data (names of methods and attributes or explanations) about the individual elements on the screen. They show up if the mouse pointer is positioned over the following:

- method in a menu from the browser's menu bar
- icon in the browser's toolbar, icon in the editor or icon in the viewer
- name of attribute, relationship or aggregated object in the editor
- button in the editor, search window or viewer

3.1.3   Toolbar

The icons in the toolbar enable quick access to the most commonly used methods. The icons are divided into two groups. The first group contains icons for quick access to general methods, which can be chosen for each class or object, and the second group contains icons for quick access to selected class methods.

3.1.3.1   Icons for accessing general methods

The icons in this group are set automatically. As a rule, their contents are not changed.

Depending on the position in the browser, only those automatically set icons, which can be selected and used, are active. All other icons are greyed-out.

The toolbar consists of the following automatically set icons:

- ☐   icon for creating an object – equal to the **Class / New Object** method

- 🔍   icon for searching for objects in a selected class – equal to **Class / Search**

- 🔍   icon for searching for an object by key in a selected class – equal to **Class / Search by key**

- 🔲   icon for opening the editor for a selected object to enter or change object properties – equal to **Object / Edit**

- 🔍   icon for opening the viewer for a selected object – equal to **Object / Show**

- 🖨   icon for printing selected objects – equal to **Object / Print**

- 📜   icon for sending selected objects – equal to **Object / Send**

The first three icons become active when you select one of the classes in the part of the window containing modules and classes. All other icons will not become active until you select an object in the workspace.

Note:

*If the COBISS3/Cataloguing software module is visible in the part of the browser window containing modules and classes, the icon for opening the cataloguing user interface will be displayed in the toolbar. The icon will appear if you select the **Bibliographic record** class, the **Authority record (CONOR)** class or the **CORES** class in the part of the window containing modules and classes.*

3.1.3.2 Icons for accessing selected class methods

You can add buttons from this group at your own discretion and the icons are connected with the username. They enable a quick access to the selected class methods.

You can add them by selecting the **Setting the toolbar** method, which opens by clicking the right mouse button in the toolbar of the browser. In the **Toolbar setting** window you can select which methods you would like to have in the toolbar for the quick access and you can also specify a short name of the button.

> Note:
>
> *The icon name is limited to maximum 4 characters.*

After you click the **Save** button the icon is added to the toolbar behind the automatically set icons. The button added to the toolbar shows the graphic of the class method and the short name of the button.

3.1.4 Modules and classes

Part of the browser window, which shows the entire structure of COBISS3 software and includes the following modules:

- Cataloguing
- Acquisitions
- Serials
- Electronic resources
- Holdings
- Loan
- Interlibrary Loan
- Application Administration

Each module contains classes. Hence, you will find a folder icon () in front of the module name, and a further graphical symbol in front of that, which will tell you whether a folder is open or closed (see chapter *3.1.4.2*). An open folder displays the module structure including all classes, in which methods can be performed.

Each class has an icon with a letter code in front of its name. The colour of the icon tells you to which module the class belongs to, the letter code tells you the class name.

3.1.4.1 Selecting a class

Select the class in the part of the window containing modules and classes by clicking on the class icon or name. The class will become highlighted; the part of the window containing queries will display the queries for the selected class.

Example:

The instruction "Select the **Partner** class" means that you have to click on the name **Partner** or the icon in front of it in the part of the window containing modules and classes.

Tip:

To activate the part of the window containing modules and classes, you can also press <Alt> + <C>. To select a class, use the arrow keys <up>, <down>. When selecting the class, previously prepared and saved queries for the selected class will be displayed in the part of the window containing queries.

Once you have selected a class, you can:

- create a new object
- search for objects in this class
- send objects from the report queue to their destinations
- add found and selected objects to the report queue
- send found and selected objects to their destinations
- define hit list formats
- perform a method which enables business transactions

3.1.4.2 Opening and closing folders

The graphical symbol in front of a folder shows whether a folder is open ( ) or closed ( ). To open a folder and see its structure, click . To close a folder and hide its structure, click .

Example:

The instruction "Open the COBISS3/Interlibrary Loan module" means that you have to click on at the interlibrary loan module. The graphical symbol will change and the content of the folder, i.e. the classes within the module, will be displayed.

Options   You can open or close a folder by clicking on the folder icon ( ) or folder name.

3.1.5 Workspace

The workspace is a part of the browser window, where objects, created or selected for further processing, are being stored. For each object in your workspace, you will see:

- the object icon, identical to the class icon

- the data identifying the object

The object status can be visually displayed by using five colours:

- black is the default colour for objects
- red is the colour for warnings, e.g. claim for material received, newly arrived ILL request or notification
- grey is the colour for cancellation, e.g. cancel order
- green is the colour for closed objects (i.e. the business transactions are finished)
- blue colour is used for different things in different modules

3.1.5.1   Loading objects

When you log in to COBISS3 software, the workspace will be empty. As you work, objects will load onto your workspace, which you:

- created
- selected after a search
- selected from related objects
- selected from object shortcuts

Every new or selected object will be added to the end of the list in your workspace and will be highlighted. If the object is already in the workspace, it won't load again, but will only be highlighted.

Aggregated objects, selected from the related objects, will be added to the basic object on the workspace. If an object contains more objects from another class, a folder (📁) will appear under the main object with the name of all aggregated objects, even if you select only one. The graphical symbol in front of the folder will help you to show (▣) or hide (▾) the contents of the folder (see chapter *3.1.4.2*).

3.1.5.2   Selecting objects

In the workspace, you can select objects for further processing. Select each object by clicking on the icon or the data identifying that object. The selected object will become highlighted. In the part of the window containing class attributes, the attributes and attribute values for the selected object will appear, the part of the window containing related objects will display all objects related to the selected object.

Example:
The instruction "Find and select the object" means that you have to load the object onto your workspace (by selecting it after a completed search, selecting it from the object relationships or shortcuts, searching by object key) and that the object becomes highlighted on the workspace.

Tip:

To activate the workspace, press <Alt> + <W>, then select the object with the arrow keys <up>, <down>. You can select the object with the arrow keys <up>, <down>. When selecting the object, attribute values of the selected object are displayed in the part of the window containing attributes. Objects which are related to the selected object or which are aggregated in the selected object are displayed in the part of the window containing related objects.

When an object is selected, you can:

- open the editor and enter or edit its properties
- view its properties and the properties of related or aggregated objects
- print a report at the default destination (printer)
- send a report to the default destination (printer or e-mail address)
- perform the selected method which enables the business transaction
- select related or aggregated objects

The selected object can also be:

- added to shortcuts
- removed from workspace
- added to report queue

3.1.5.3   Removing all objects

All objects can be removed from the workspace at once.

Procedure   3.   Select the **Workspace / Remove all objects** method.

> Tip:
> The fastest way to remove all objects from the workspace is by pressing <F7>.

3.1.5.4   Removing selected objects

One or more objects can be removed from the workspace at the same time (see Appendix *A.4*).

Precondition   The object(s) you would like to remove must be selected.

Procedure   4.   Select the **Workspace / Remove selected object** method.

3.1.5.5   Refreshing a list of objects

Only the data of the objects, for which you perform procedures, is refreshed. The data identifying other objects in the workspace does not refresh automatically while you perform procedures. If more users are working on the objects at the same time, the data also cannot refresh automatically. Occasionally, you will have to refresh the list of objects in the workspace

manually and coordinate it with the actual situation of these objects in the database.

Procedure   5.   Select the **Workspace / Refresh** method.

> Tip:
>
> The quickest way to refresh the list of objects on the workspace is to press <F5>.

3.1.6   Class attributes

The part of the browser window, where, once you select an object in your workspace, the names of most of the attributes of the selected object and their values will be displayed.

Attributes cannot be changed in this part of the window.

In this window, you can copy only selected text to the clipboard with the combination of keys <Ctrl> + <C>.

3.1.7   Related objects

The part of the browser window for the display of all objects, which are either related to the selected object or are a part of it (i.e. aggregated objects).

For every related object, you will see:

- the object icon, identical to the class icon
- the data identifying the object

When more than one object of the same class can be related to the selected object, or objects are aggregated in the selected object, you will see:

- folder icon (□)
- name of the relationship and number of related objects

3.1.7.1   Object selection

You can transfer objects, which you would like to select for further processing, from the window containing related objects to your workspace if you double-click on the icon or name of the relationship or grab the related object with the mouse and drop it into the workspace.

If there is a folder icon (□) in front of the name of the relationship, you can open a list of objects by double-clicking on it. You can select one or more objects at the same time and transfer them to your workspace by clicking the **Select** button.

> **Tip:**
>
> The quickest way to select individual objects from the list of objects and transfer them to your workspace is by double-clicking them.

Aggregated objects, which you select from the object relationships, will be added to the main object on your workspace. If an object contains more than one object from another class, a folder icon (🗀) with the names of its aggregated objects will appear under the main object, even if you select only one aggregated object. The graphical symbols in front of the folder enable you to show (🔹) or hide (🔹) the folder's contents (see chapter *3.1.4.2*).

> **Tip:**
>
> To activate the part of the window containing related objects, press <Alt> + <R>, then select an object using the arrow keys <up>, <down>.

3.1.8   Queries

The part of the browser window, which displays previously prepared and stored search criteria – *queries*. After you select a class, this part will display all queries you have stored while searching in the search window for that class (see also chapters *4.3.1.3* and *4.3.3*).

For each query, you will see:

- the graphical symbol for query (🗋)
- the name you defined for that query

> **Note:**
>
> *Queries are bound to your username.*

3.1.8.1   How to use a query

For instructions on how to use queries, see chapter *4.3.3*.

3.1.8.2   Renaming a query

Procedure

6. In the part of the window containing queries, click on the icon or the query name to select a query.

7. Select the **Queries / Rename** method**.**

   The **Query** window will open.

8. Delete the existing name and enter the new name.

9. Click the **OK** button.

3.1.8.3   Deleting a query

Procedure   10. In the part of the window containing queries, click on the icon or the query name to select a query.

11. Select the **Queries / Delete** method.

   The **Confirm** window will open, with the question "Are you sure you want to delete?"

12. Click the **Yes** button.

3.1.9   Shortcuts

The part of the browser window containing a list of shortcuts to objects, which can be selected in the browser without prior searching. Each shortcut contains:

- the object's icon
- the name you defined for the shortcut

> Note:
>
> *Shortcuts are bound to your username.*

3.1.9.1   Adding an object to shortcuts

Procedure   13. Select the object in your workspace.

14. Select the **Object / Add to Shortcuts** method.

   The **Shortcut** window will open.

15. Define the name of the shortcut.

16. Click the **OK** button.

   The new shortcut to the object will appear at the bottom of the list of shortcuts.

Options   You can also add an object from the workspace to the shortcuts by grabbing it with the mouse and dragging it to the part of the browser with shortcuts.

If you select multiple objects in the workspace, you can add multiple objects to the shortcuts at the same time.

> Tip:
>
> If you want to add multiple objects to the shortcuts at the same time, select the objects that you wish to add and grab and drag them to the part of the browser with the shortcuts with the combination of <Ctrl> key and the right mouse click.

3.1.9.2   Using a shortcut

You can transfer an object from the part of the window containing shortcuts to your workspace.

Procedure

17. In the part of the window containing shortcuts, click the object shortcut to select it.

18. Select the **Shortcuts / Add object to workspace** method.

Options

You can transfer an object to your workspace by double-clicking the shortcut or by grabbing it with the mouse and dragging it to the workspace.

If you select multiple objects in the part of the browser with shortcuts, you can add multiple objects to the workspace at the same time.

> Tip:
>
> If you want to add multiple objects to the workspace at the same time, select the shortcuts that you wish to add and grab and drag them to the workspace with the combination of <Ctrl> key and the right mouse click.

.

3.1.9.3   Renaming a shortcut

Procedure

19. In the part of the window containing shortcuts, click the object shortcut to select it.

20. Select the **Shortcuts / Rename** method.

    The **Shortcut** window will open.

21. Delete the existing name and enter the new name.

22. Click the **OK** button.

3.1.9.4   Deleting a shortcut

Procedure

23. In the part of the window containing shortcuts, click the object shortcut to select it. You can select several shortcuts at the same time (see Appendix *A.4*).

24. Select the **Shortcuts / Delete** method.

    The **Confirm** window will open with the question "Are you sure you want to delete?"

25. Click the **Yes** button.

3.1.9.5   Viewing object properties in the shortcuts

Procedure

26. In the part of the window containing shortcuts, click the object shortcut to select it. You can select several shortcuts at the same time (see Appendix *A.4*).

27. Select the **Shortcuts / Show** method.

28. The viewer will open for the object, to which the shortcut is pointing. If you select more shortcuts at the same time, the viewer for the object linked to the first selected shortcut will open once you have selected the method. You can move to the next object in the viewer by clicking .

3.1.10   Status bar

The line beneath the centre of the browser window, which contains the **Messages** button for opening the COBISS3 software messages window.