COBISS ®

Co-operative Online Bibliographic System & Services

COBISS3 Basic Guidelines

V6.21-00

User Manual

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IZUM ®

The manual includes all updates from the first printed version of the manual published in February 1999 onwards. Its content corresponds with the COBISS3, V6.21-00 software, and is also valid for all future software versions until it is either withdrawn, or another electronic version is published.

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PREFACE

COBISS3 is the name for the third generation of software, developed by IZUM for the needs of the COBISS system. The first generation of software was named ATLASS; this was followed by the second one which shared the name of the COBISS system (now called COBISS2), while the latest generation, developed on the basis of object technology, is called COBISS3.

With a new concept, new tools were included into the COBISS3 software development process, such as tools for object analysis, design, and implementation and configuration management.

One of the architectural characteristics of the COBISS3 software is the three-tier concept: user interface, business logic and database. All three layers are connected through the RMI object model (*Remote Method Invocation*); Oracle is used for databases.

The COBISS3 software is developed in Java, which is more than just a programming language, since it enables the application to work in different environments:

- user interface (Windows 98/Windows 7/ME/2000/XP/Vista, Linux, Mac)
- business logic (Windows 2000/XP, Linux)
- database (Windows 2000/XP, Linux)

The COBISS3 software consists of nine modules:

- COBISS3/Cataloguing
- COBISS3/Acquisitions
- COBISS3/Serials
- COBISS3/Electronic Resources
- COBISS3/Holdings
- COBISS3/Loan
- COBISS3/Interlibrary Loan
- COBISS3/Reports
- COBISS3/Application Administration

COBISS3/Cataloguing is the central module of the COBISS3 software; it supports shared cataloguing within the Co-Operative Online Bibliographic System and Services (COBISS). It enables the following procedures when working with bibliographic and authority records in different databases: searching and viewing records, creating and editing records, downloading records from the COBIB database and different foreign databases, resolving duplicate records, resolving local bibliographic records and splitting authority records. Both cataloguing and working with authority records take place in a single cataloguing user interface.

COBISS3/Acquisitions is a module which enables libraries the automation of the following procedures for acquiring monographs: purchase (consisting of pre-order selection, order and prepayment of items ordered, receipt of items ordered and payment of items received), receipt and shipment of monographs based on exchange, receipt of legal deposit copies and gifts, keeping records of other types of library material acquisition, claims for undelivered and received material, received invoices and documents for prepayment, partner data maintenance, fund data maintenance and counter set-up.

COBISS3/Serials is a module which enables the automation of the following procedures for acquiring serials: purchase (consisting of pre-order selection, order, order cancellation, prepayment and payment of serials), receipt and shipment of serials based on exchange, legal deposit copy or gifts along with other types of library acquisition, maintenance of publication pattern data and performance of serials check-ins, sending publications in exchange and sending legal deposit material, claims for missing issues, prepayment documents and received invoices, partner data maintenance, fund data maintenance and counter set-up.

COBISS3/Electronic Resources is a module which enables libraries the automation of the following procedures for acquiring electronic resources: purchasing packages and licences for individual electronic resources, prepayment and payment of electronic resources, receipt of legal deposit of electronic publications, links to e-book loan portals, partner data maintenance and fund data maintenance as well as counter set-up.

COBISS3/Holdings is a module which enables the following actions: adding fields 996/997 and 998, entering and changing data in these fields, copying data to fields 996/997, changing the status in several fields 996/997 within the record, changing the data in fields 996/997 using accession numbers or loan numbers, sorting fields 996/997 within the record, making up a set, printing labels, accessioning monographs, de-accessioning missing monograph copies after inventory. Management of serial holdings data allows you to accession serials, create and edit publication patterns, perform serials check-in based on publication patterns, and also provides support with binding, unbinding and de-accessioning issues and volumes of serials. The module includes also the following procedures: creating parallel local records in the local database, transferring fields 996/997 from one bibliographic record to another, displaying records in the COMARC format, checking the loan status of copies, printing the list of recently received materials, setting up counters for adding accession numbers, running numbers and loan numbers as well as displaying the list of libraries, updating material data with multimedia, and checking and selecting discarded library material.

COBISS3/Loan is a module which enables libraries the automation of the following procedures: entering and editing data on library members, deleting data on library members, changing library membership card numbers and printing library membership card labels, lending materials for outside loan or> for reading room loan, renewing loan periods, changing due dates, returning material with or without the option of selecting library members, reserving available and currently unavailable material, returning material with restriction, recording the loss of material, printing lending forms and transferring data from the reference students database. For serials, you can specify routing lists and record routing of individual issues of serials. In libraries in which loan is organized in separate departments it is possible to keep separate loan records by department, to put material on interdepartmental loan from the parent department to the host department, to lend that material further to members in the host department, to return material in any department and search for material in the catalogue by departments. For the needs of loan systems, a note about the copy (item) can be added for individual copies (items) of material; for material on loan, temporary notes can be entered as well. In the local catalogue, you can perform searches for individual items of material, view bibliographic and holdings data and, if the item is not available, provide the information about who borrowed the material if it is not currently available. It is possible to use different criteria to search for data on library members, and then print out the search results as a list. Libraries that charge their members for specific services can also manage their price lists, record and settle debts, print invoices, cancel debt settlement, close out cash register and view cash register transactions. For members with delays in returning library material, libraries can create and print out overdue notices. Libraries can also change the contents of overdue notice forms, time parameters for loans, the opening days calendar, the settings for the electronic notification of library members; they can set the restricted number of material on loan, the restricted number of loan renewals and the membership validity period for individual member category, and change the URL address with contact details and notifications related to the My library service in COBISS/OPAC. It is now also possible for libraries to perform automated loan procedures in the mobile library and use the RFID self-checkout and RFID reader at the lending desk.

COBISS3/Interlibrary Loan is a module which includes the following procedures: recording customer requests for ILL, reservation of home library materials, ordering materials from suppliers or the library's closed stacks, recording the receipt of material to the customer, recording the receipt of materials from suppliers or the library's closed stacks, delivery of materials to the customer, return of materials from the customer and return of materials to the supplier or the library's closed stacks. It also includes preparation and submission of invoices for legal entities, i.e. partners who order or pay for the services provided, preparation of messages for customers and suppliers, partner data maintenance and price lists as well as counter set-up.

COBISS3/Reports is a module which allows you to create multiple types of reports, such as different forms, business documents, statistics, etc. Reports are created on the basis of data from all the COBISS3 software modules and can be printed out or sent by e-mail when they are ready. The standard-form reports for each module are designed at IZUM.

COBISS3/Application Administration is a module which allows libraries to maintain data on their home library and partners and to view data on system users.

The contents of the manual correspond to the currently valid version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published. The contents of the manual are saved on the **Training** portal and available by selecting *E-manuals*, you can also access the contents directly by going to the **Help** menu within the COBISS3 software.

For better understanding of software functioning, a glossary of the used expressions is included in the *COBISS3 Basic Guidelines* User Manual.

Further information and help is available at the seat of the National COBISS Centre in your country (contact details published on the last page of the manual).

ABOUT THE MANUAL

Writing conventions used in this manual:

1. Text in **bold** indicates the names of windows, tabs and buttons.

> Examples:
>
> The **Order** editor will open.
> The **Order cancellation** window will open.
> Click the **Details** tab.
> Click the **Select** button.

2. The names of menus and methods in the menu bar are printed in **bold**. The name of the menu is followed by the name of the method. Names of classes are also indicated in **bold**.

> Examples:
>
> Select the **Order** class.
> Select the **Class / New Object** method.

3. Those parts of the text which have to be emphasised are written in ***bold italics***.

> Example:
>
> The ***destination*** can be an e-mail address or a printer.

4. Icons are displayed graphically.

> Example:
>
> Click the  icon.

5. Names of attributes, parameters and drop-down lists are indicated with double inverted commas.

Example:

Under "Hit list format", select the format, in which you wish the search results to be displayed.

6. Attribute values are displayed in *italics*.

Example:

If a customer would like to buy a copy of an article, select the value *purchase* under "Service type", the value *article* under "Material type" and *copy* under "Medium type".

7. The keys on the keyboard are enclosed in angle brackets.

Example:

<Enter>, <Tab>, <Shift>, <Ctrl>, <Alt>, <Esc>.

8. A plus sign (+) between two key names indicates that both keys have to be pressed simultaneously.

Example:

<Ctrl> + <P> require you to press <Ctrl> and <P> at the same time. Press <Ctrl> first and hold it down, then press <P>.

1 INTRODUCTION

The following instructions describe the basic characteristics of COBISS3 software, which are common to all modules. Some special characteristics, related to the COBISS3/Cataloguing software module are also added (all the characteristic, related to the user interface components, are described in detail in the *COBISS3/Cataloguing* User Manual; see chapter 3–5).

Software installation

The minimum hardware and software requirements, as well as certain system requirements, have to be met in order to be able to run the software. Internet access is required for the installation of the user interface.

User interface

The COBISS3 user interface consists of the following components:

- ***browser*** – the main window of the user interface, which enables the selection of modules and classes, viewing of and navigating between objects, performing basic methods in classes and objects as well as methods which enable business transactions
- ***search window*** – enables searching for objects within a selected class
- ***editor*** **–** enables entering and editing attributes of a selected object and its aggregated objects, defining relationships, viewing of aggregated objects and objects, related to the selected object
- ***cataloguing user interface*** – enables the procedures for cataloguing bibliographic resources and the procedures for working with authority records (the cataloguing user interface is described in *COBISS3/Cataloguing* User Manual; see chapter 3).
- ***viewer*** – enables viewing of the properties of a selected object, aggregated objects as well as objects related to the selected object

Basic procedures

The following basic procedures can be performed in all modules:

- creating an object
- entering and editing object properties
- searching
- viewing object properties
- preparing and sending report

Settings

The default settings can be customized. You can change the font type and size, window size, the destinations for sending reports, etc.

Tips for data entry When entering characters and data, which require a formatted data entry, certain rules must be followed.

Appendices Appendix A contains some basic tips for working in the Windows environment. Appendix B contains a list of shortcuts (hotkeys) for some of the methods and procedures.

2 COBISS3 INSTALLATION

The following chapter describes the system requirements and the installation process for the COBISS3 user interface to be installed in your library. It also contains instructions on how to start and finish work when you use COBISS3 software.

Subchapters:

- System requirements
- User interface installation
- Login and logoff

2.1 SYSTEM REQUIREMENTS

One of the main characteristics of COBISS3 software is its three-tier model consisting of:

- user interface (on client)
- business logic (on server)
- database (on server)

The layering ensures higher software flexibility, less hardware and operating system dependence and easier maintenance. It also enables different installation options of COBISS3 software in the libraries.

1. ***Server installation at IZUM***

   Your library can use IZUM's own server, where COBISS3 software is installed already. In this case, the user interface and Java must be installed on all computers in the library (clients), which have access to the server.

   COBISS software has been tested to work in the Windows and Linux environment.

2. ***Server installation in your library***

   - COBISS3 application server and the additional software (Oracle database, Java, etc.) must be installed to a separate computer (with Windows operating system installed) in the library. The library must make sure that IZUM's staff has permanent access to that computer at all times by using *ADMIZUM* as a username.

2.2 USER INTERFACE INSTALLATION

The first user interface installation is performed online.

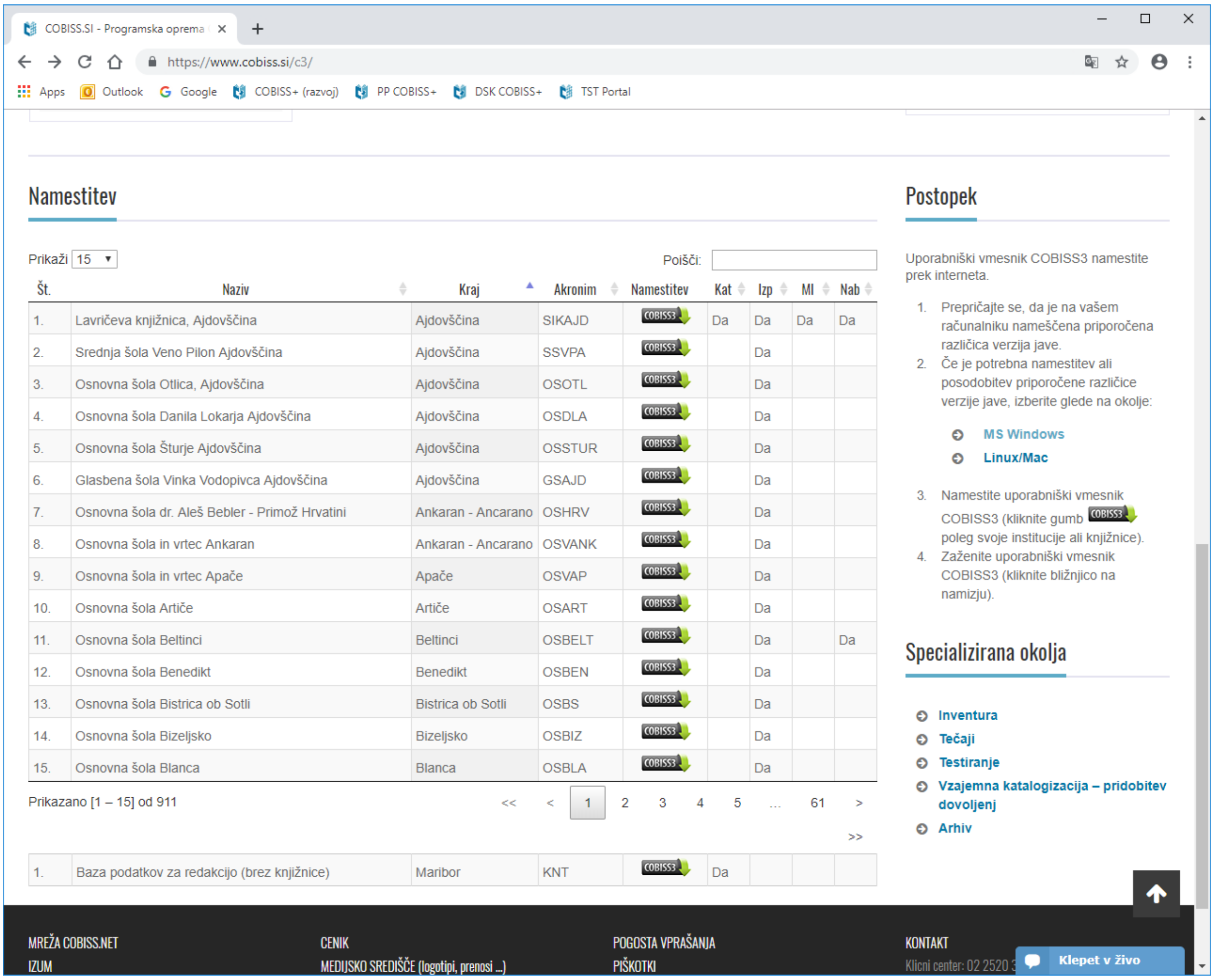


Figure 2.2-1: User interface installation

First visit ***https://www.cobiss.si/c3*** to check if the latest version of Java is installed on your computer (client). If it is not, please install Java first. To install the user interface, select your library from the list of libraries that use the COBISS3 software, and click COBISS3 (see *Figure 2.2-1*).

Click the shortcut ( ) on your desktop to run the COBISS3 software.

2.2.1 Folder and standard variable installation for the COBISS system

For the correct operation of COBISS3 software, you must have the folder **C:\Cobiss3Files** created on your personal computer. If the folder has not been created, the software will alert you once you log in to the software. The system administrator can create the folder **C:\Cobiss3Files** and the standard variable **COBISS_DIR** with the value *C:\Cobiss3Files* manually or with the use of an installation program. Both the folder and the standard variable are required for the correct operation of peripheral devices (e.g. RFID devices, POS terminals, certificates, etc.).

The installation program and the instructions for the installation of the folder and the standard variable for the COBISS system are available on the website ***https://www.cobiss.si/priporocena-oprema/***.

2.3 LOGIN AND LOGOFF

2.3.1 Start using COBISS3 software

Procedure

1. Double-click the shortcut on your desktop to run the software.

   The **Login to COBISS3** window will open.

2. Enter your username under "Username" (e.g. *ana*), and enter your password under "Password". The password must be between 5 and 32 characters long. Your password will not be visible on the screen; a series of asterisks will appear in the field; one for each character.

   > Note:
   >
   > *Passwords are case sensitive. In other words,* summer *is not the same as* SUMMER *or* Summer. *If you enter your password incorrectly, the software will not allow you to log in.*

   If you forget your password or the password is locked, click the *Change COBISS password* link. The link enables you to access the **Training** portal, where, after a successful authorization, you can change the password you use when you log in to COBISS3 software (by selecting *Change COBISS password*).

3. Click the **OK** button.

If your login is successful, the main COBISS3 window - the ***browser*** - will open, which will enable you to access the following modules:

- COBISS3/Cataloguing
- COBISS3/Acquisitions
- COBISS3/Serials
- COBISS3/Electronic Resources
- COBISS3/Holdings
- COBISS3/Loan
- COBISS3/Interlibrary Loan
- COBISS3/Reports
- COBISS3/Application Administration

The login window will close after you enter your password incorrectly three times in a row.

If you enter your username or password incorrectly six times in a row, the software will not allow you to log in any more. First you must change your password on **Training** portal, and then you can log in to the COBISS3 software again.

The software will not allow you to log in, if the time and date on the server and the client do not match or the software version on the client is different to the software version on the server. In the first case, adjust time and date on the client, in the second, upgrade the software on the client.

2.3.2 Finish working with COBISS3 software

When you wish to finish your work, close the browser window.

Procedure

1. Select the **System / Exit** method.

   The **Logoff** window will open with the question "Are you sure you want to exit the program?"

2. Click the **Yes** button.

When you exit the browser, the user settings for the size of some windows are saved.

Options

You can close the browser window by clicking  in the title bar.

3 USER INTERFACE

The following chapter describes the COBISS3 user interface components:

- browser – the main window of the user interface, enables selection of modules and classes, viewing of and navigating between objects, performing basic methods within classes and objects as well as performing methods which enable business transactions
- search window – enables searching for objects within a selected class
- editor – enables entering and editing attribute values of the selected object and its aggregated objects, defining object relationships, viewing of aggregated objects and objects related to the selected object
- viewer – enables viewing attributes of the selected object, aggregated objects and objects related to the selected object

To perform the procedures for cataloguing bibliographic resources and the procedures for working with authority records, the cataloguing user interface, described in *COBISS3/Cataloguing* User Manual (see chapter 3), will be used instead of the editor.

Subchapters:

- Browser
- Search window
- Editor
- Viewer

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*).

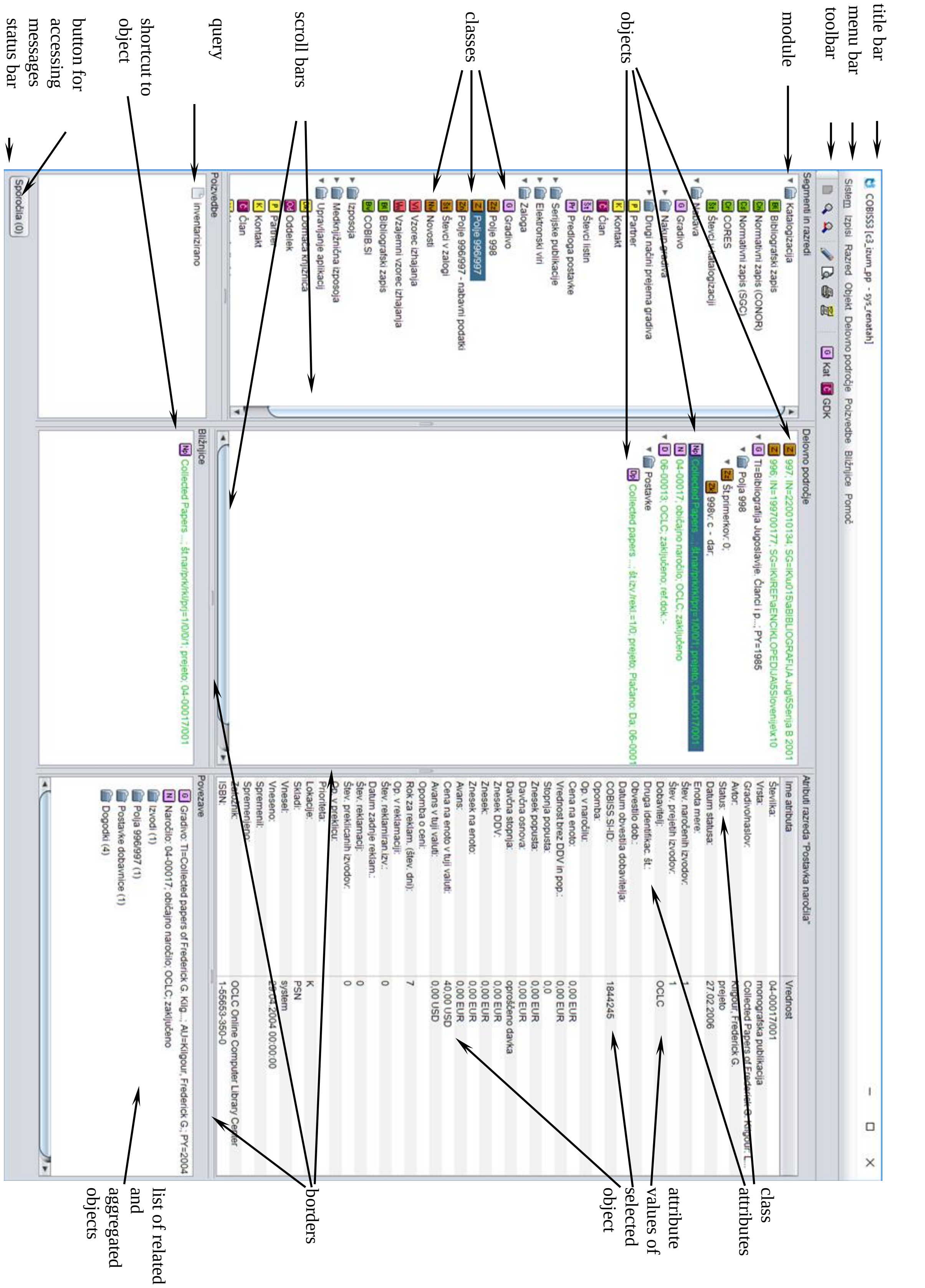


Figure 3.1-1: Browser

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

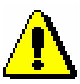
The icons in this group are set automatically. As a rule, their contents are not changed.

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.

3.2 SEARCH WINDOW

The search window is a user interface component, which enables the following:

- searching for objects in different databases:
  - in the Oracle relational database (objects, created with COBISS3 software)
  - in databases from the existing COBISS.SI system
  - in the selected catalogues of other foreign libraries
- selecting of objects for further processing
- viewing properties of found and selected objects
- saving queries

The search window consists of the following elements:

- title bar where you can see the COBISS3 software icon and the word "Search" followed by the name of the class, within which you are searching for objects (when searching for bibliographic records, the name of the database will be displayed in brackets, following the name of the class)
- button for selecting the database (the button is only available in the search window within the **Bibliographic record** and **COBIB.SI** classes):
  - **COBIB.XX** – searching records in the shared bibliographic database
  - **< local database acronym >** – searching bibliographic records in the local database
- button for selecting the search mode:
  - **Expert search** – searching with search prefixes and suffixes as well as logic and context operators
  - **Advanced search** – search by search fields
- field for selecting the attribute according to which the search results will be sorted and checkbox for descending sorting type
- tabs that enable searching in attributes of multiple classes at the same time (available only in the advanced search mode)
- search fields (only available in advanced search mode)
- buttons for selecting additional operators EMPTY, NOT or NOTEMPTY (available only in advanced search mode)
- fields for entering search requests
- expand buttons
- drop-down lists for selecting between the operators AND and OR (only available in advanced search mode)
- fields for additionally limiting the search: "Limiting" (only available in advanced search mode) and "Scanning"

- buttons for displaying the list of search prefixes and suffixes and limiting suffixes (available expert search mode only)
- button for displaying instructions for scanning
- search buttons
  - **Find** – for finding objects after entering search request
  - **Find all** – for finding all objects
  - **Clear** – deleting search parameters and search results
  - **Last search** – repeating last query
  - **Save query** – saving entered search criteria
- line breaks checkbox
- field for changing the hit list format
- field for selecting previously saved queries
- number of hits
- search results
- buttons:
  - **Select all** – transferring all found objects to the report queue (the button is only available in the search window which opens after selecting the **Class / Send** method)
  - **Select** – selecting one or several objects for further work; the selected objects are transferred to your workspace
  - **Show** – detailed viewing of one or several
  - **Next 10** – transferring the next ten objects to the search results
  - **Next 200 –** transferring the next two hundred objects to the search results
  - **Close** for exiting the search window
- message about the options of displaying more search results (e.g. More, End)

You can also open the search window in the ***editor*** for the selected object, if you press <F3>, but only, if there is more than one object saved in the class, to which the selected object belongs to.

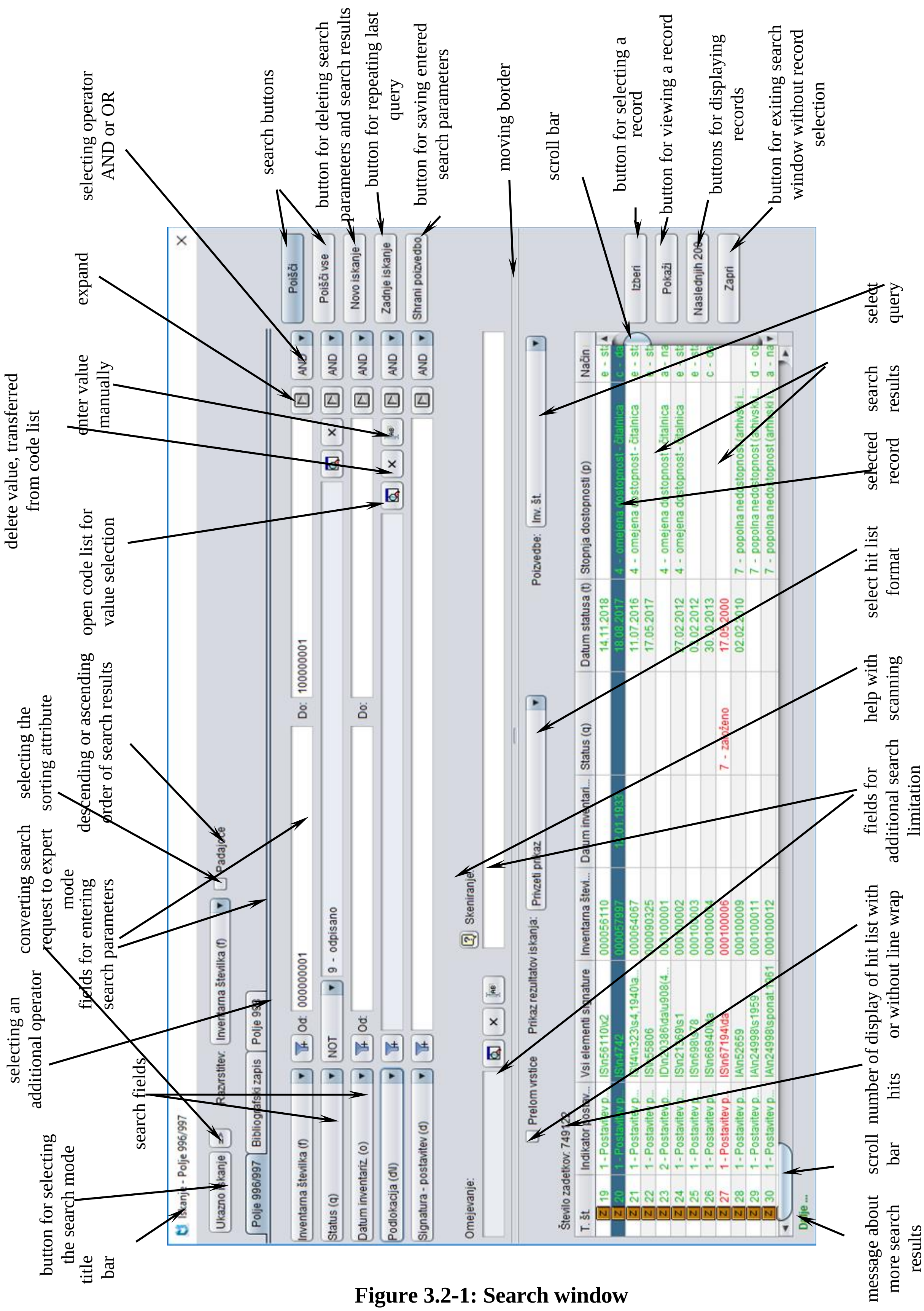


Figure 3.2-1: Search window

3.3 EDITOR

The editor is one of the user interface components which enables entering and changing properties of the selected objects (i.e. attribute values) and aggregated objects, defining object relationships, viewing aggregated and related objects.

The editor usually contains only those object attributes, which can be entered or edited. Those object attributes, whose values you define when you perform business transactions, are usually only visible in the part of the window containing attributes in the browser.

The editor consists of the following elements:

- title bar, where you can see the name of the class, which the object belongs to; if you open the editor for an object while it is being modified by another user, you will also see this message "Object is being modified by <username>"
- tabs
- names of attributes, presented descriptively or displayed as buttons
- attribute values, which you can enter by using entry fields or windows for entering values, by selecting values from drop-down lists or code lists, ticking checkboxes, etc.
- related objects, presented in a list or displayed as buttons; lists can be edited by using the buttons for adding, removing and showing objects, which are related to the selected object
- aggregated objects, presented in a list or displayed as buttons; lists can be edited by using the buttons for creating, editing, deleting and showing aggregated objects
- buttons for performing certain activities
- button for saving object
- button for exiting the editor without saving the changes

While working in the editor, the names of attributes, whose values ***must*** be entered (i.e. mandatory fields*)*, if you want to save the object, are displayed in light blue.

The entry fields which, depending on the object status, ***cannot*** be filled in, are greyed-out. The entry fields, where you can enter values by selecting them from drop-down lists, and entry fields for defining relationships are also greyed-out.

The size of the editor windows and some editor elements can be changed by placing the cursor at the edge of the window and dragging it accordingly.

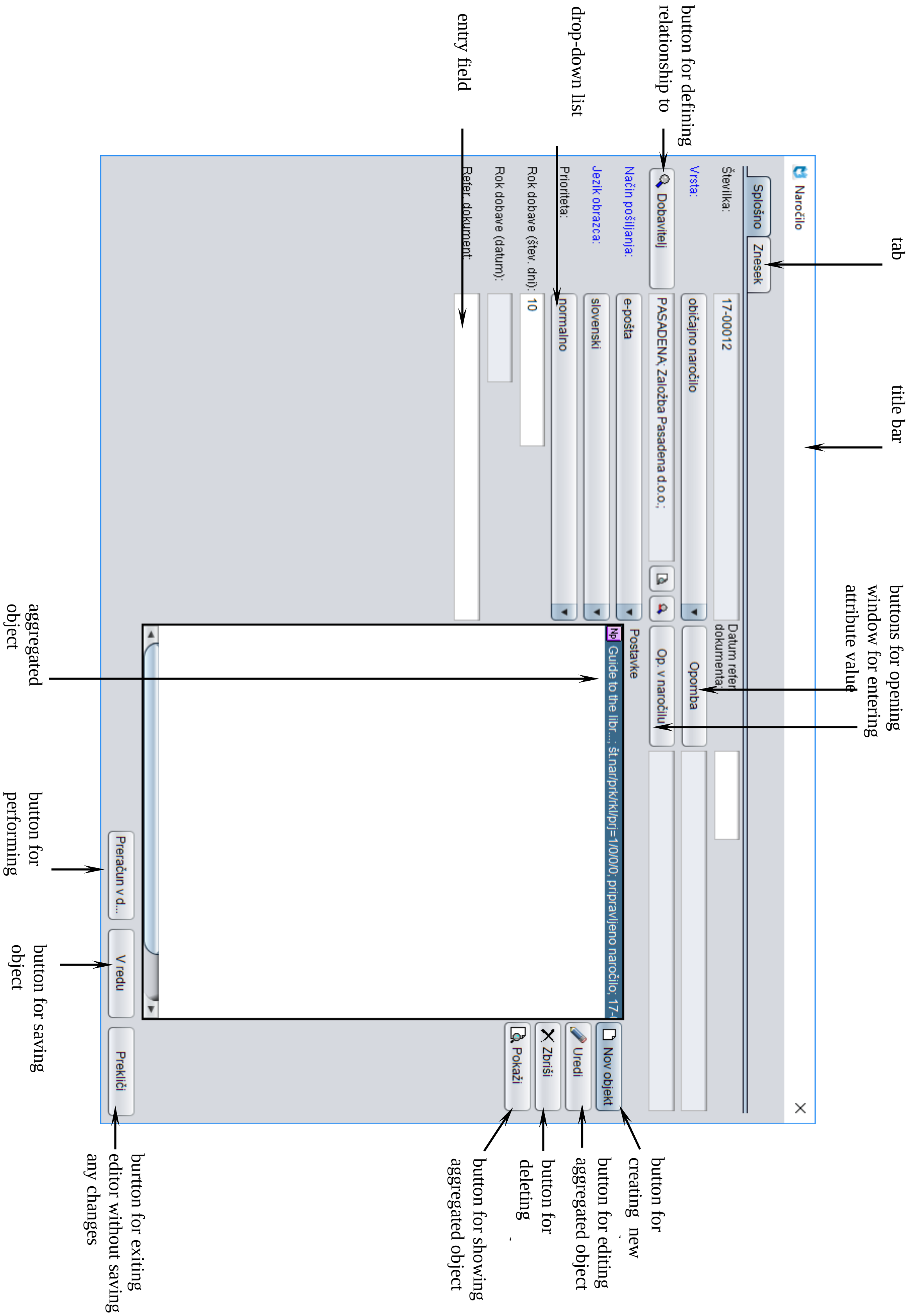


Figure 3.3-1: Editor

3.4 VIEWER

The viewer is a user interface component, which enables viewing properties of a selected object as well as its aggregated and related objects.

The viewer displays the same information as the part of the window containing class attributes and related objects in the browser, the main advantage of the viewer being that you can open it in the ***browser,*** the ***editor*** and the ***search window***. Another advantage is that more than one viewer can remain open at the same time.

The viewer consists of the following elements:

- title bar where you can see the COBISS3 software icon and the word "Viewing" followed by the name of the class; if you open the viewer for an object while it is being modified by another user, you will also see this message: "Object being modified by <username>"; if you open the viewer in the search window, after the class name you will see the current number, under which the object you are viewing is shown in the hit list in the search window (“Cur. No.”).
- the icons **Back** and **Forward**, which are inactive when you open the viewer
- the icons **Previous** and **Next**, which will only be displayed if you open the viewer for more objects at the same time
- the tabs **Basic display format**, **MARC** and **Standard display format**, which enable viewing the properties of the selected object in different display formats (the tabs are only available in the viewers of those classes, in which bibliographic or authority records are stored)
- part of the window containing attributes of the selected object
- part of the window containing a list of objects, which are related to or aggregated in the selected object
- buttons for the part of the window containing related objects:
  - **Open** for displaying the attributes of the object, which you select from the list of related objects, in the existing viewer window
  - **New window** for displaying the attributes of the object, which you select from the list of related objects, in a new viewer window
- the **Print** button for printing the object
- the **Close** button for closing the viewer window
- the **Close all** button for closing all open viewer windows

For each object, the part of the window containing related objects will show the following:

- 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 it contains aggregated objects, you will see:

- folder icon ( )

- name of the relationship and number of related objects

If you change the size of the viewer window or the size of its parts, the new size will be saved as the default value once you close the viewer. The new default value will remain valid until you change it.

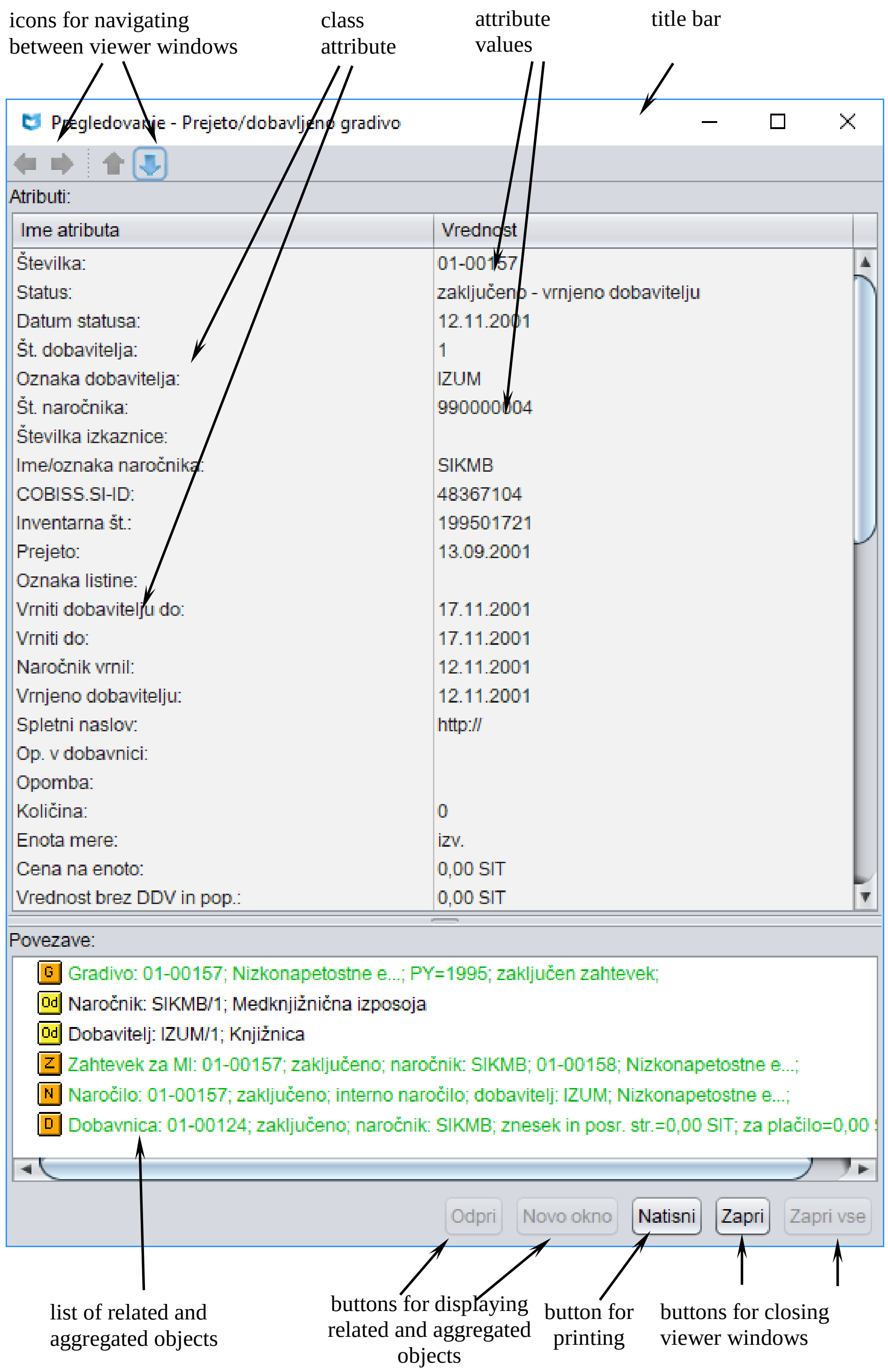


Figure 3.4-1: Viewer

4 BASIC PROCEDURES

The following chapter describes the basic procedures which you can perform within the COBISS3 user interface.

Subchapters:

- Creating an object
- Entering and editing object properties
- Searching
- Viewing object properties
- Preparing and sending reports
- Managing report queues
- Editing local code lists
- Editing jobs

4.1 CREATING AN OBJECT

Procedure

1. In the part of the window containing modules and classes, select the class.
2. Select the **Class / New Object** method.

   The object editor will open.

> Example:
>
> Create a new price list by selecting the class **Price List,** and then the **Class / New object** method.

> Tip:
>
> The quickest way to create an object is to press <Ctrl> + <N> after you have selected a class.

Options

An object can also be created:

- by using a method, which enables business transactions

  > Example:
  >
  > Create a new object in the COBISS3/Acquisitions software module within the **Delivery note** class by finding and selecting the required object within the **Order** class. Then select the **Object / Enter delivery note** method.

- by using the button for creating an aggregated object in the editor for the selected object (see chapters *4.2.3.1* and *4.2.3.2*)

  > Example:
  >
  > Create a new object in the COBISS3/Acquisitions software module within the **Order item** class by clicking the **New object** button in the **Order** editor.

What to do next

Enter the object properties and save the object.

4.2 ENTERING AND EDITING OBJECT PROPERTIES

You can enter or edit object properties in the editor. Object properties are:

- attributes
- relationships
- aggregated objects

While working in the editor, the names of attributes, whose values ***must*** be entered (i.e. mandatory fields), if you want to save the object, are displayed in light blue.

The entry fields which, depending on the object status, ***cannot*** be filled in, are greyed-out. The entry fields, where you can enter values by selecting them from drop-down lists, and entry fields for defining relationships are also greyed-out.

Procedure

1. Find and select the object.
2. Select the **Object / Edit** method.

   The object editor will open.

> Tip:
>
> The quickest way to open the object editor is to press <Ctrl> + <E> after you have selected an object on the workspace.

3. Enter or edit the attribute values (see chapter *4.2.1*).

   After you enter the attribute value, move to the next field by pressing <Tab>. You can also select the field for entering the attribute value if you click on it.
4. Define object relationships (see chapter *4.2.2*).
5. Create or edit aggregated objects (see chapter *4.2.3*).
6. Save the object (see chapter *4.2.4*).

The editor window will close.

Options

The editor window will also open, if you:

- select the method for creating an object (see chapter *4.1*)
- click the **Edit** button in the editor for the main object to change the properties of the aggregated object

4.2.1 Attributes

In the editor, you can define attribute values by:

- entering them into entry fields
- entering them into windows for entering attribute value
- entering them into windows for entering values of repeatable attributes
- selecting them from drop-down lists
- selecting them from code lists
- using checkboxes
- using radio buttons

4.2.1.1 Entering the value into entry fields

Procedure

1. Click on the entry field next to the name of the attribute.
2. Enter the desired value.

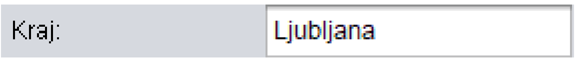


Figure 4.2-1: Entry field

Example:

In the **Partner** editor, click on the entry field next to "City" and enter desired value.

Note:

Some attribute values (e.g. dates) require formatted data entry (see chapter 6.2*).*

4.2.1.2 Entering the attribute value into the windows for entering values

Procedure

1. Click the button with the attribute name (see *Figure 4.2-2*).

   The window with the attribute name will open (see *Figure 4.2-4*).
2. Enter the value.
3. Click the **OK** button.

The window with the attribute name will close. Part of the value entered is visible in the field next to the button with the attribute name.

Figure 4.2-2: Button with attribute name

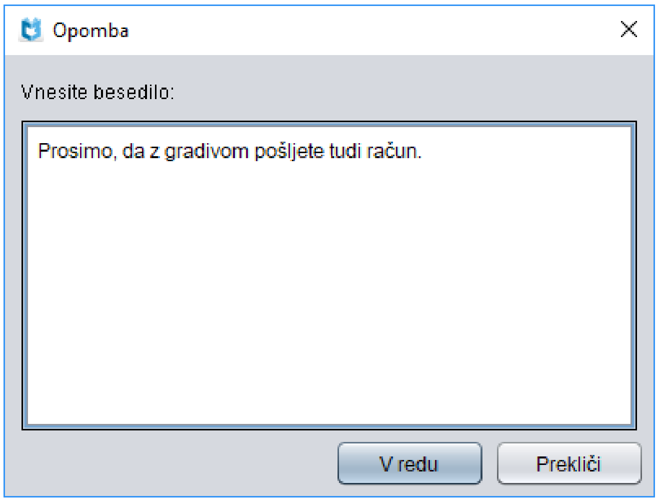


Figure 4.2-3: Window for entering attribute value

Example:

In the **Order** editor, click the **Order note** button, type the desired text into the window with the attribute name and save.

4.2.1.3 Entering the attribute value into the windows for entering values of repeatable attributes

Any number of values can be entered to the windows for entering values of repeatable attributes.

Procedure

1. Click the button with the attribute name (see *Figure 4.2-2*).

   The window with the attribute name will open (see *Figure 4.2-4*).
2. Enter values of individual attributes under "New value".
3. Click the **Add** button. The entered value will be added to the list with the attribute name displayed under number one (i.e. the value of the first attribute in a sequence of attributes).
4. To ***add*** values for the new attribute, repeat steps 2 and 3.
5. To ***edit*** the values of an individual attribute, highlight the desired value in the list, enter the new value under "New value" and click the **Replace** button.
6. To ***remove*** one of the attributes, highlight it in the list, and click the **Remove** button.
7. You can rearrange the attributes in the list. To move an attribute one place up, highlight it in the list and click the **Up** button. To move an attribute one place down, highlight it in the list and click the **Down** button.

8. Click the **OK** button.

The window with the name of the attribute will close. Part of the value entered is visible in the field next to the button with the attribute name. The values of individual attributes are separated by a slash ("/").

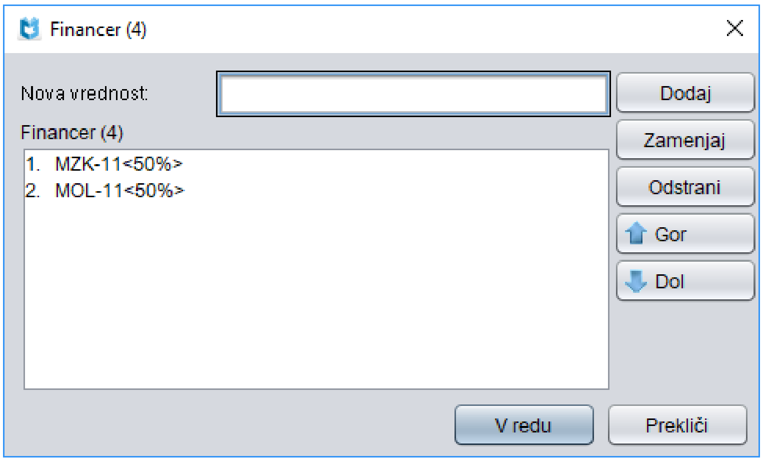


Figure 4.2-4: Window for entering values of repeatable attributes

4.2.1.4 Selecting the value from drop-down lists

Procedure

1. To open the drop-down list, click in the field containing the arrow "▾".

   If the data is not obligatory, the first line in the drop-down list will be empty.

2. Select the appropriate value.

   There are two ways of doing it:

   - select the value using the arrow keys (<up>, <down>, <Home>, <End>, <PgUp>, <PgDn>) and then press the space bar
   - point the mouse pointer to the desired value and click

   The drop-down list will close automatically.

Figure 4.2-5: Field for display and selection of values from a drop-down list

Tip:

The quickest way to select a value from the drop-down list is to type the first letter of the value you want and press the space bar.

Note:

To remove the transferred value from the field, select the first, i.e. empty line from the drop-down list.

4.2.1.5 Selecting the value from code lists

For attributes, which require a coded entry, their values can be defined by:

- selection from code list
- entry of code or value into the entry field in front of the icon for displaying code list

Figure 4.2-6: Field for entering coded values and icon for code list display

Procedure

1. Enter the code or the first part of the code and click next to the entry field for attributes. Click the icon first if you want the code list to open first. If you want to open the code list using only the keys, press <Tab> and then press the space bar.
2. Find and select the appropriate value from the list.

   This can be done in three different ways:

   - point the mouse pointer to the desired value and click
   - select the value using the arrow keys (<up>, <down>, <Home>, <End>, <PgUp>, <PgDn>) and then press the space bar
   - find the value by using the buttons **Find** and **Find next** (see chapter *4.2.1.5.1*)
3. Click the **OK** button.

The selected value will be transferred to the entry field in front of the icon for code list display.

Tip:

The quickest way to select a value from the code list is to point the mouse pointer to the desired value and then double-click.

Options

For attributes, which require a coded entry, you can define their value by entering the code or value into the entry field in front of the icon for code list display.

Note:

In such cases, it is sometimes possible to type a value into the entry field, which is not defined in the code list. You can only do so if the local code list is used and if it is defined in the configuration file of the home library.

4.2.1.5.1 Finding values in the code list

Procedure

1. Click the **Find** button in the window with the name of the code list.

   The window for entering search terms will open.

2. Enter the value, which you wish to find. It is sufficient to enter only a part of the value you are looking for.

> Note:
>
> *When entering a part of the value you are looking for, do not use the truncation symbol "*", because the programme will search for the exact string of characters entered.*

3. To perform the search, click the **OK** button.

   The first found value in the code list will be highlighted. If it is not the value you are looking for, find the next one(s) by clicking the **Find next** button.

   When the last value you are looking for is automatically found in the code list, after you click the **Find next** button, the following question will appear: "Do you wish to continue searching at the beginning?" After you click the **Yes** button, the window containing the message will close and the first value you are looking for will again be highlighted in the code list. By clicking the **Find next** button you can continue viewing other found values.

4.2.1.6 Selecting the value with checkboxes

Click the checkbox (☐) to select or deselect it. If there is a tick inside the box (☑), the option is selected, if the box is empty, the option is not selected. Checkboxes represent options which are not interdependent, so you can select more than one option at the same time.

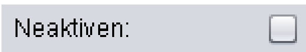


Figure 4.2-7: Checkbox

4.2.1.7 Selecting the value with radio buttons

Click the radio button (○) to select or deselect it. If there is a dot inside the field (◉), the option is selected, if the field is empty, the option is not selected. Radio buttons represent options which exclude each other, so you can only select one option at a time.

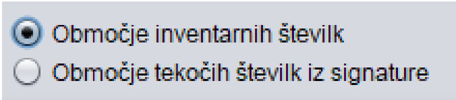


Figure 4.2-8: Radio buttons

4.2.2 Object relationships

An object can be related to one or more objects.

Example:

You send an order to your supplier. Because the information about the supplier is saved as an object in the **Partner** class, you have to relate the object from the **Order** class to the object from the **Partner** class.

Related objects are independent and can also exist on their own in a database.

Relationships are ***always defined*** in the editor for the selected object. You can ***change*** their properties after you have selected them in the browser through searching or relationships.

In the editor for the selected object, related objects are displayed in two different ways:

- as a button, in cases where the selected object can only be related to one object from another class; the button displays the icon in front of the object's name
- as a list, when the selected object can be related to more objects from another class

4.2.2.1 Relationships with one object

4.2.2.1.1 Defining a relationship

Procedure

1. In the editor for the selected object, click the button which represents a relationship.

   The search window for the class, from which you wish to select an object, will open.

2. Find and select the object, which you wish to relate to the object you are currently editing (see chapter *4.3.1*).

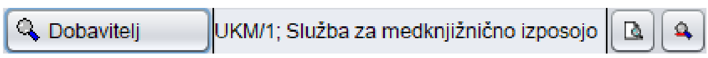


Figure 4.2-9: Button with the name of the related object

Example:

In the **ILL request** editor click the **Supplier** button, find a partner, which also acts as a supplier in the **Search – Partner** search window, and select it.

4.2.2.1.2 Defining a relationship using the icon for entering or deleting a relationship

Procedure

1. Click next to the entry field with the name of the button, which represents a relationship.

   The window for entering or deleting the relationship will open.
2. Enter the object ID, i.e. the attribute value, which uniformly identifies the object.
3. Click the **OK** button.

4.2.2.1.3 Deleting a relationship using the icon for entering or deleting a relationship

Procedure

1. Click next to the entry field with the name of the button, which represents a relationship.

   The window for entering or deleting the relationship will open.
2. Delete the object ID, i.e. the attribute value, which uniformly identifies the object.
3. Click the **OK** button.

4.2.2.1.4 Viewing a related object

Procedure

1. Click next to the entry field with the name of the button, which represents a relationship.

   The viewer for the related object will open (see chapter *4.4*).

4.2.2.2 Relationships with more objects

4.2.2.2.1 Defining a relationship

Procedure

1. In the editor for the selected object, click the **Add** button.

   The search window for the class, from which you wish to select an object, will open.

2. Find and select the object, which you wish to relate to the object you are currently editing. You can select one individual object or more objects at once (see chapter *4.3.1*).

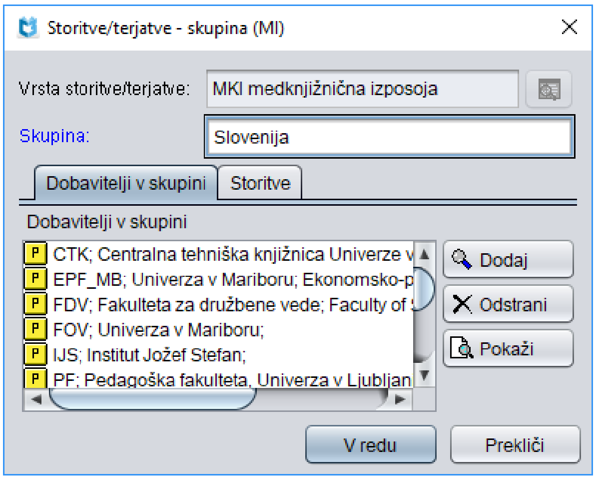


Figure 4.2-10: List of related objects in the editor for the main object

Example:

To add a new partner to one of the groups of suppliers in the price list, click the **Add** button in the **Services/debts – group (ILL)/Suppliers in group** editor, then find and select the partner in the **Search – Partner** search window.

4.2.2.2.2 Removing a relationship

Procedure

1. In the list of objects, related to the object being edited, click the object to select it.
2. Click the **Remove** button.

4.2.2.2.3 Viewing a related object

Procedure

1. In the list of objects, related to the object being edited, click the object to select it.
2. Click the **Show** button.

   The viewer for the related object will open (see chapter *4.4*).

4.2.3 Aggregated objects

An object may contain one or more objects from other classes.

Example:

An order contains several items. The data about the items is saved as objects in the **Order item** class. Because an individual item cannot exist on its own in a database (i.e. not without an order), it can only represent an aggregated object of the object from the **Order** class.

Aggregated objects are ***always created*** in the editor for the selected object. You can ***change*** their properties after you have selected them:

- in the browser by searching or through relationships
- in the editor for the selected (main) object

In the editor for the selected object, aggregated objects are displayed in two different ways:

- as a button, when the selected object can only contain one object from another class; the button displays the icon in front of the object's name
- as a list, when the selected object can contain more objects from another class

4.2.3.1 Creating an aggregated object

4.2.3.1.1 Creating an aggregated object and editing its properties

Procedure

1. In the editor for the selected object, click the button which represents an aggregated object.

   The editor for the aggregated object will open. The main object will be saved to the database automatically.
2. Enter or edit the properties of the aggregated object.
3. Click the **OK** button.

   The editor for the main object will open.

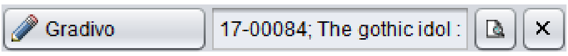


Figure 4.2-11: Button with the name of the aggregated object

Example:

In the **ILL Request** editor, click the **Material** button, then enter and save the material's bibliographic data in the **Material** editor.

4.2.3.1.2 Deleting an aggregated object

Procedure

1. Click next to the entry field with the name of the button, which represents an aggregated object.

4.2.3.1.3 Viewing an aggregated object

Procedure

1. Click next to the entry field with the name of the button, which represents an aggregated object.

   The viewer for the aggregated object will open (see chapter *4.4*).

4.2.3.2 Creating more aggregated objects

4.2.3.2.1 Creating an aggregated object

Procedure

1. In the editor for the main object, click the **New object** button.

   The editor for the aggregated object will open. The main object will be saved to the database automatically.

> Note:
>
> *Sometimes you have to select an individual class in order to open the editor for the aggregated object.*

2. Enter the properties of the aggregated object.
3. Click the **OK** button.

   The editor for the main object will open.

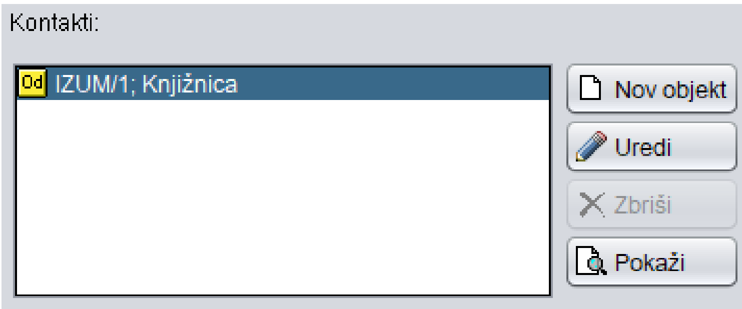


Figure 4.2-12: List of aggregated objects in the editor for the main object

> Example:
>
> To enter information about partner's contacts, click the **New object** button in the **Partner/Roles and contacts** editor, select the contact person or department, enter the data about the aggregated object and save it.

4.2.3.2.2 Editing properties of an aggregated object

Procedure

1. In the editor for the main object, click the object from the list of aggregated objects to select it. The data which identifies the object will become highlighted.
2. Click the **Edit** button.

   The editor for the aggregated object will open. The main object will be saved to the database automatically.
3. Edit the properties of the aggregated object.
4. Click the **OK** button.

   The editor for the main object will open.

Options

You can also edit the properties of an aggregated object by doing one of the following:

- find and select the aggregated object from the class in which it was saved
- select the aggregated object from the list of objects, which are related to the main object

Select the **Object / Edit** method.

4.2.3.2.3 Deleting an aggregated object

Procedure

1. In the editor for the main object, click the object from the list of aggregated objects to select it. The data which identifies the object will become highlighted.
2. Click the **Delete** button.

4.2.3.2.4 Viewing an aggregated object

Procedure

1. In the editor for the main object, click the object from the list of aggregated objects to select it. The data which identifies the object will become highlighted.
2. Click the **Show** button.

   The viewer for the aggregated object will open (see chapter *4.4*).

4.2.4 Saving an object

Once you enter or edit the object properties in the editor, you have to save the object in the database.

Procedure

1. In the editor for the selected object, click the **OK** button.

The editor will close. The object will automatically contain the username of the user who made the entry or the change, and the time and date of the entry or change made.

The main object will also be saved to the database automatically, if you:

- define the object relationship
- enter or edit properties of the aggregated object

If you do not wish to save the object, click the **Cancel** button. The editor will close and the object properties, which you entered after your last save, will not be saved in the database.

4.3 SEARCHING

You can find an object in three different ways:

- in the search window
- through a query
- by object key

4.3.1 Searching in the search window

Using the search window, you can search for all the objects in a selected class or limit your search with search parameters.

Procedure

1. In the part of the window containing modules and classes, select the class.
2. Select the method **Class / Search**.

   The search window will open in a default advanced search mode.

   Tip:

   The quickest way to open the search window is to press <F3> after you have selected a class.

   Note:

   The search window can also open when you perform other methods, provided that searching is a part of those methods. In such cases, some of the search parameters might be preset and cannot be changed, however, additional search parameters can be added. In such a case, the search window will not contain the ***Find all*** *button.*

   If you select the search method and the selected class contains only one object, that object will load onto the workspace automatically without opening the search window.

3. If required, change the search fields (see chapter *4.3.1.1*).
4. Specify the search parameters (see chapter *4.3.1.2*).

   You can use different combinations of search parameters by entering them into individual search fields and limit them additionally with operators.

   You can also specify the search parameters, if you select a previously saved query from the drop-down list in the "Queries" field (see chapter *4.3.1.3*). The search parameters from the selected query will be transferred to the search fields.

In search windows that enable search for bibliographic and authority records you can move to expert search by clicking **Expert search** button, where you can enter the search request in the edit box in the "Search request" field. When entering the search string you can use the list of search prefixes and suffixes and limiting suffixes, which can be found by clicking the button . A list of all search indexes used in bibliographic databases can be found in *COBISS3/Cataloguing* (see Appendix *A.1*).

When creating a search request, you can make the process easier by creating the search request first by using the search fields in advanced search mode and then clicking the => button. Once you click the button, the software changes the search mode from advanced to expert and converts the entered search request to the appropriate search structure (prefixes and suffixes are added to the search terms and the search terms are linked with logical and context operators). If required, you can then update the search request or change it in some other way before you perform the search.

Expert search is intended for more advanced users who are familiar with the structure of records within the COBISS.SI database and the search techniques within databases. Additional instructions on searching can be found in the *COBISS3/Cataloguing* user manual (see ch. *4.2*) or on the COBISS+ website under "More information…".

Tip:

You can select the default search mode. If you click the **Save query** button right after you click the **Expert search** button, expert search will be saved as the default search mode and will remain valid until you change and save it again. The default search mode is bound to your username.

You can return to advanced search by clicking the **Advanced search** button.

5. The search can be additionally limited by bibliographic resource type and font (in "Limiting") and narrow the search in other search fields by non-indexed data (in "Scanning"). You can find the explanations regarding additional search limitation in the *COBISS3/Cataloguing* manual (see chapter *4.1.4* and *4.3*).

Note:

*If the search request is entered in "COBISS.SI-ID" and the field "Limiting" is also entered, the limitation is **not** considered in the search.*

6. You can select the sorting type according to a specific attribute. You can choose between attributes of the selected search class. If you tick the checkbox next to "Descending", all search results will be sorted by the selected attribute in descending order.
7. Click the **Find** button.

   The program will start a search in the selected search type.

If you do not specify any search parameters, click the **Find all** button. The programme will find all objects which are saved in the selected class.

When the search is completed, the programme will display the number of objects found in the database, which correspond to the selected search parameters (under "No. of hits"). In the bottom part of the search window, a hit list in the last selected hit list format will be displayed.

> Note:
>
> *If you cannot find the desired objects in the search window of the* ***Bibliographic record*** *class, you can switch to searching the shared database by clicking the* ***COBIB.XX*** *button. A search will be performed according to the same criteria as in the local database. By clicking the* **<local database acronym>** *button, you can switch back from searching the shared database to searching the local database.*
>
> *If you wish to find the objects you found in the* ***COBIB.XX*** *class search window in the local database, click the* **<local database acronym>** *button. A search will be performed according to the same search terms used in the shared database. To switch from searching the local database to searching the shared database, click the* ***COBIB.SI*** *button.*

8. Under "Hit list format", select the format, in which you wish the search results to be displayed.
9. If you tick the “Line wrap” checkbox, the search results in the individual columns will be displayed in multiple lines and as a whole. If you clear the checkbox, the hit list will be displayed with no line wrap (the text will be displayed in one line and only within the column width).
10. If the programme finds more than 10 objects, which match the selected search parameters, only the first ten will be displayed in the hit list. You can activate the report of the next 10 objects by clicking the **Next 10** button, and the report of the next 200 object by clicking the **Next 200 button**.
11. The shown search results can be sorted, i.e. you can sort the data, swap columns or change column width.

    To ***sort*** the data, click on the name of the column. Regardless of whether the data is textual or numerical, you can sort the data in ascending or descending order.

    To ***swap*** columns, point the mouse pointer to the name of the column, click and hold the left mouse button and then drag the column either to the left or right.

    To ***change*** column ***width***, point the mouse pointer to one of the borders of the column, click and hold the left mouse button and then drag the border either to the left or right.
12. You can ***copy*** the hit list, the objects of which are displayed in the bottom part of the search window, into an Excel file. Click on any object in the hit list and press <Ctrl> + <C> to copy the hit list to the clipboard. Move the

hit list from the clipboard to the selected location in the Excel file by pressing <Ctrl> + <V>.

13. To transfer one or more objects from the hit list to your workspace after a search, highlight them and then click the **Select** button.

    To select all objects from the hit list without highlighting them, click the **Select all** button in the search window, which opens when you select the method for sending reports to destinations.

> Tip:
>
> The quickest way to transfer an object to the workspace is to double-click it.

14. To view the properties of one or more objects from the hit list, highlight the desired object(s) and click the **Show** button.

    The viewer for the selected object will open (see chapter *4.4*).

15. To remove the entered search parameters and the search results, click the **Clear** button.
16. If you want to repeat the last search or review the search results, click the **Last search** button.
17. To exit the search window without selecting an object, click the **Close** button.

4.3.1.1 Selecting search fields

The top part of the search window will display the search fields with the names of attributes, which you can use to search for objects within the class, for which you opened the search window. The number of search fields depends on the space available in the search window of a specific class. The search window of some classes also shows two fields for additional search limitation.

The search field "Name elements" (included in the search windows **Search – Partner** and **Search – Contact**) and the search field "Keywords" (included in the search window **Search – Materials** and in the search window of classes, where the bibliographic records are stored) combine more attributes which are indexed ***by word***, which means that you can enter one or more words as a search parameter. During the search, the programme will use the logical operator AND between the words. Individual words can be truncated using the truncation symbol "*". A search cannot be performed for words, which are shorter than 3 letters, because words with one or two letters have not been indexed.

> Examples:
>
> The easiest way to find ***material*** is to search for it in the search field "Keywords". In that case, a search by title, author, series, publisher and place of publication will be performed.

The easiest way to find a ***partner***, a ***contact person*** or a ***contact department*** is to use the search field "Name elements". In that case, a search by name, surname, second name and department will be performed.

The existing search fields can be exchanged (see chapter *4.2.1.4*).

You can exchange an individual search field or all search fields in a window.

Example:

To find a partner who acts as a customer for interlibrary loan, click on one of the search fields in the drop-down list and select the "Customer (ILL)" search field.

If you change the order of the search fields and click the **Save query** button (do not enter the search criteria into the search fields), the order of the search fields will be saved once you close the search window and will remain saved until you change and save the order of the search fields again. In search windows which enable searching several classes at once you can only change the order of the search fields on the first tab. The rearrangement of the order of the search fields is bound to your username.

In some search windows, you can search for objects ***in several classes***. Depending on the parameters, according to which you wish to search for objects, select the desired class by clicking the tab with the class name under the title bar in the search window. Next, select the corresponding search fields from that class and enter the search parameters. The search result will always be an object from the class, for which you opened the search window.

Example:

To find the fields 996/997 for the records, issued in 2006, open the search window for the **Field 996/997** class, click the **Bibliographic record** tab in the search window, select the "Publication year" search field and enter the search parameter *2006*.

4.3.1.2 Entering search parameters

To enter a search parameter, type it in, select it from the code list or define it using the radio button. To select the entry field for search parameters, click on it. Once you have typed in the search parameter, move on to the next entry field by pressing <Tab> three times.

Most attributes are indexed ***by phrase***, which means that you have to enter the attribute value as a whole or truncate it with the truncation symbol "*". However, you can only truncate after the second letter.

For dates and numbers, search parameters are entered in from – to intervals. If you are looking for a particular date or number, enter the search parameter under "From" or "To" only. When you click the **Find** button, the programme will automatically copy the search parameter into the other ("To" or "From") field.

For coded data, you have to enter the search parameters using the code list (see chapter *4.3.1.2.1*).

When using radio buttons, you can select values in two different ways:

- point the mouse pointer to the radio button and click
- using <Tab>, move to the radio button ("Yes" or "No") and press the space bar

You can use different combinations of search parameters by entering them into individual search fields. Among them you can choose between logical operators AND or OR. By default, logical operator AND is set between search fields.

Example:

In the search window of the Field 996/997 class in "Date of accessioning (o)" enter the start and end date for the period, when the material was accessioned, in "Status (q)" set the value to *9 – de-accessioned*. Logical operator AND is set between both search fields.

The search result are the de-accessioned unites, which were accessioned in the selected period.

Example:

In the search window of the Field 996/997 class in "Status (q)" set the value to *7 – misplaced*, and in the repeated search field "Status (q)" set the value to *8 – lost*. Logical operator OR is selected in the drop-down list.

The search result are units, which are misplaced or lost.

Search requests can be additionally limited by using additional operators:

- EMPTY

  The operator EMPTY specifies that the search results do not include any records that contain the attribute by which you limited the selected search field.

Example:

In the search window of the Field 996/997 class select operator EMPTY in "Status (q)".

The search result are material units, which do not have a selected status.

Note:

If you select the operator EMPTY for an individual search field, entry of the search request into the entry field is disabled.

- NOT

The operator NOT specifies that the search results include objects that do not contain the values you enter into the entry field for the selected search field.

Example:

In the search window of the Field 996/997 class select the additional operator NOT in "Status (q)" and set the value to *9 – de-accessioned*.

The search results contain material units, that are not de-accessioned.

- NOTEMPTY

The operator NOTEMPTY specifies that the search results include objects that definitely include the attribute by which you limited the selected search field.

Example:

In the search window of the Field 996/997 class select the additional operator NOTEMPTY in "Accession number (f)".

The search results contain all accessioned material units.

Note:

If you select the operator NOTEMPTY for an individual search field, entry of the search request into the entry field is disabled.

Note:

When performing a search, the operators NOT, EMPTY and NOTEMPTY take precedence, followed by AND and OR. If you combine the last two, the advanced search is performed in the sequence that the operators are written in (i.e. if the operator OR is before the operator AND, OR takes precedence). If you combine the last two in expert search, the AND operator keeps its precedence over the OR operator.

Example:

In the search window of the **Field 996/997** class set the first and second range of accession numbers in "Accession number (f)" and select the additional operator OR between the search fields. For the next search field set the "Status (q)", where you select the additional operator NOT and set the value to *9 – de-accessioned.* Between the search field for defining the second range of accession numbers and the search field for defining the status select the logical operator AND.

Accession number (f)	From: 0000015	To: 0999999	***OR***
Accession number (f)	From: 1000000	To: 1999999	***AND***
Status (q)	***NOT***	9 – de-accessioned	

The search results are material units, which are not de-accessioned and have a defined accession number in one of the selected ranges.

4.3.1.2.1 Entering search parameters using the code list

Procedure

1. Click next to the entry field for search parameters.
2. To find and select the desired value in the list, point the mouse pointer to it and click (see chapter *4.2.1.5.1*).

   You can select multiple values from the list (see appendix *A.4*); the logical operator OR will be used after the search is launched (the result is the same as if you choose two or more identical search fields).
3. Click the **OK** button.

Tip:

The quickest way to select a value from the code list is to point the mouse pointer to the value and double-click.

Note:

In some cases, you can enter search parameters into entry fields, which are displayed as a code list, but only, if it is a local code list, and if this option is defined in the configuration file. In such a case, click next to the entry field for search parameters, and then enter the desired value.

4.3.1.2.2 Deleting search parameters, entered using the code list

Procedure

1. Click next to the entry field for search parameters.

4.3.1.2.3 Expand

When entering search parameters, you can use the ***expand*** function. It is used for searching by phrase, where you want to be certain that the phrase you entered is correct.

Procedure

1. Enter the beginning of the search parameter into the entry field (e.g. the beginning of a partner's name, address, particular coded data, etc.).

   If you are not familiar with the beginning of the search term, you can leave the entry field blank.
2. Click next to the entry field for search parameters.

   The **Expand** window will open displaying a list of all terms starting with the entered (or first) search term. The list is sorted alphabetically; if the data is coded, the list is sorted by ascending code value. The number before each term tells you how many times that term occurs in the database. To move on to the next page of the list, click the **Forward** button, to move to the previous page, click the **Back** button.
3. Find and select the desired value from the list.

   You can do this in two ways:

- select the value with your mouse pointer and confirm it by clicking the **OK** button
- select the value using the <up>, <down>, <PgUp> and <PgDn> keys, and press the <Enter> key

The selected value will be transferred to the entry field.

> Tip:
>
> The quickest way to select a value from the list of values is to point the mouse pointer to it and double-click.

4.3.1.3 Saving queries

You can save search terms within one search in the form of a query and use it later. Queries are saved in the search window.

Procedure

1. Enter the search terms (see chapter *4.3.1.2*).
2. Click the **Save query** button.

   The **Query** window will open.
3. Enter the name of the query.
4. Click the **OK** button.

   The query will be added to the search window next to "Queries" and to the browser in the part of the window containing queries.

4.3.1.4 Selecting the hit list format

In the search window, the hit list can be displayed in the default format or one of the formats you have defined yourself (see chapter *4.3.4*).

Procedure

1. Under "Hit list format", select the desired format. You can do this before or after a search is performed.

The lastly selected hit list format will be saved and taken into account for the next search (until it is changed).

4.3.2 Searching by key

The quickest way to search for an object within a selected class is to search by key. You can search by key if you know the exact value of the attribute, which uniformly identifies the object (object ID).

Procedure

1. In the part of the window containing modules and classes, select the class.

2. Select the **Class / Search by key** method.

   The window for entering the object key will open.

Tip:
The quickest way to open the window to enter the object key is to press <F4> after you have selected a class.

3. Enter the data which uniformly identifies the object.
4. Click the **OK** button.

The object is loaded to the workspace.

Note:
If searching by key is not possible, the search window for the selected class will open after you select the method ***Class / Search by key****.*

4.3.3 Searching through queries

Procedure

1. In the part of the window containing modules and classes, select the class.
2. In the part of the window containing queries, select the query.
3. Select the **Queries / Find** method.

In the last hit list format you selected, the number of hits and the list of found objects that correspond to the search parameters saved in the query will be displayed. You can edit the list, view the objects or transfer them to the workspace (see chapter *4.3.1*, steps 8–12).

Options

You can also activate a query by double-clicking the graphic symbol or the name of the query in the part of the window containing queries.

A query can also be activated in the search window (see chapter *4.3.1*, step 4).

4.3.4 Editing hit list formats

To display the hit list in the search window, you can define different hit list formats for different classes.

Procedure

1. In the part of the window containing modules and classes, select the class.
2. Select the **Class / Hit list formats** method.

   The **Editing hit list formats** window will open with a list of formats that were previously defined. In the beginning, the list is empty.

3. Add a new hit list format or edit the existing one (see chapter *4.3.4.1*).
4. Delete the hit list format (see chapter *4.3.4.2*).
5. Click the **OK** button.

> Note:
>
> *As the hit list formats are bound to your username, each user must define the selected format themselves and add it to the hit list format.*

4.3.4.1 Adding and changing hit list formats

You can add new hit list formats or change already defined hit list formats in the list of hit list formats, which were defined for the selected class.

The hit list formats are changed in the **Editing hit list formats** window.

Procedure

1. To ***add*** a new format, click the **Add** button. To ***change*** an already defined format in the list, click on it to select it, and then click the **Edit** button.

   The **Hit list format** window will open.
2. Under "Name", enter or change the name of the hit list format.
3. Define the hit list format attributes.

   To ***add*** an attribute to the hit list format attributes, highlight it under "Attributes", and then click the **Add** button or press the <right> arrow key on your keyboard.

   To ***remove*** an attribute from the hit list format attributes, highlight it under "Hit list format attributes", and then click the **Remove** button the <left> arrow key on your keyboard.

> Note:
>
> *Attributes defined by the user can be added to or removed from the hit list format for the classes with records in MARC format. Editing attributes defined by the user is described in the COBISS3/Cataloguing* User Manual *(see chapter* 11.1.3*).*

4. If necessary, sort the hit list format attributes. You can move an attribute one line up or down by selecting the desired attribute and then clicking the **Up** or **Down** button. To edit the attribute order in the list, you can use the <Alt> key and the <up>, <down> arrow keys.
5. Click the **OK** button.

4.3.4.2 Deleting hit list formats

Hit list formats can be deleted in the **Editing hit list format** window.

Procedure

1. Click on the desired hit list format in the list of defined formats. The name of the selected format will become highlighted.
2. Click the **Delete** button.

   The **Confirm** window will open with the question "Are you sure you want to delete?"
3. Click the **Yes** button.

4.4 VIEWING OBJECT PROPERTIES

The viewer enables viewing attributes of the selected object, and its aggregated and related objects. One or more objects can be selected at a time.

Precondition

An object must be selected.

Procedure

1. Open the viewer. This can be done in several ways:
   - in the browser, select an object in the workspace, and then select the **Object / Show** method
   - in the browser, select an object shortcut, then select the **Shortcut / Show** method
   - in the editor, click next to the entry field with the name of the button, which represents an aggregated or related object
   - in the search window, select the desired object in the list of found objects and click the **Show** button

   The **Viewing** window will open with a list of attributes of the selected object as well as a list of its aggregated and related objects.

> Note:
>
> *In the search window, which opens when you select one of the classes, in which the bibliographic or authority records are stored, a viewer will open once you click the **Show** button, displaying the selected object(s) in the format you last used to view objects from this class (*MARC*, if you viewed an object in the COMARC/B format,* Standard display format*, if you viewed an object as a catalogue card or* Basic display format *if you viewed the list of attributes of the selected object).*

2. To view an object, which is related to or aggregated in the selected object, highlight the object and click the **Open** button. The selected object will be displayed in the existing window. To open the viewer for the selected object in a new window, click the **New window** button.

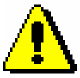
   If the aggregated objects are in an object folder, open the folder first by double-clicking on it.

> Tip:
>
> The quickest way to open the viewer for a related or aggregated object is to double-click the object. The selected object will be displayed in the existing window.

3. To move between the related objects which you opened in the same viewer, use the icon to move *back* and the icon to move *forward*.

4. If you selected more objects in the workspace or in the search window and opened the viewer, you can use the  icon to move to the *previous* object and the  icon to move to the *next* object.

5. If you want to print the selected object to printer, click to **Print** button.



Note:

For a print, Java, version 1.6 or newer, must be installed on your computer.

6. To close an individual viewer window, click the **Close** button. To close all open viewer windows, click the **Close all** button.

4.5 PREPARING AND SENDING REPORTS

Reports can be sent to one or more destinations. A ***destination*** can be:

- an e-mail address
- a printer

Usually, every report definition also contains destinations, which are considered when sending reports.

When preparing and sending reports to destinations, you can select between three options:

- ***printing***: the report is prepared and sent to the default destination, i.e. the printer (the destination e-mail address is not taken into account) – the **Object / Print** method
- ***sending***: the report is prepared and sent to the default destinations, i.e. the printer and e-mail addresses – the **Object / Send** and **Class / Send** methods
- ***submitting and sending:*** first the report is submitted, then prepared and sent to its default destinations, i.e. printer and e-mail addresses – the **Object / Submit and send** method

Procedure

1. Find and select the object or select the class.
2. Select the method for sending the report to its destinations:
   - **Object / Print**
   - **Object / Send**
   - **Object / Submit and send**
   - **Class / Send**
   - **Class / Create report from queue**

   After selecting the **Object / Print** or **Object / Send** method, the **Report definition selection** window will open, containing a list of report definitions. Report definitions are the most important type of definitions in the COBISS3/Reports software module, on the basis of which reports about the data from the database are being prepared, which can then be sent to different ***destinations***, i.e. printers and e-mail addresses. Each ***report definition*** defines the content and form of every report as well as the destination, to which the report is sent. For each class, there can be more report definitions (e.g. the list of report definitions for the **Order** class contains report definitions for orders, order cancellations, claims for received materials, etc.). A part of every list of report definitions is the *Basic report,* which can be used to display a list of attributes and their values for any selected object from any class. If the object is only related to one other object from another class or only has one aggregated object, the attributes and attribute values of that object will also be displayed.

Note:

*If you select the **Class / Send** method, the search window for the selected class will open first. Find the objects, for which you would like to prepare and send the report to its destinations. The window for selecting the report definition will open once you have selected the desired objects.*

*If you select the **Class / Create report from queue** method, the window containing a list of created report queues for the selected class will open. The window for selecting the report definition will open once you have selected the report queue, which contains the objects you would like to take into account when you send reports to their destinations.*

3. Select a report definition. You can do that in two ways:
   - select it by using the arrow keys <up>, <down> and then press <Enter>
   - click on it to highlight it, then click the **OK** button

Note:

*When you select the **Submit and send** method, the report definition will be preset by the programme, in which case the window for selecting a report definition will not open. Only the first part of the method will be performed, i.e. the report will be submitted.*

The **Overview and sending of created report** window will open, displaying a list of all prepared forms for that particular report. Each form contains the number of the document and the destination, to which it will be sent.

4. You can preview the prepared report or the individual form in the preview window (see chapter *4.5.1*).
5. You can preview the prepared report or the individual form in PDF viewer (see chapter *4.5.2*).
6. Before you send a report, you can add destinations (see chapter *4.5.3*).
7. Before you send a report, you can edit the destinations (see chapter *4.5.4*).
8. Before you send a report, you can remove one or all destinations (see chapter *4.5.5*).
9. When you send a form to an e-mail address, you can attach a file (see chapter *4.5.6*).
10. You can also remove the file which you have previously attached to the e-mail address (see chapter *4.5.7*).
11. You can edit a form before you send it to an e-mail address (see chapter *4.5.8*).
12. Before you send a report, you can specify the first page of the report (see chapter *4.5.9*).

13. You can save a prepared report (e.g. a statistical overview, which takes a long time to prepare) in an XML file and print it out later using the COBISS3/Reports software module (see chapter *4.5.10*).

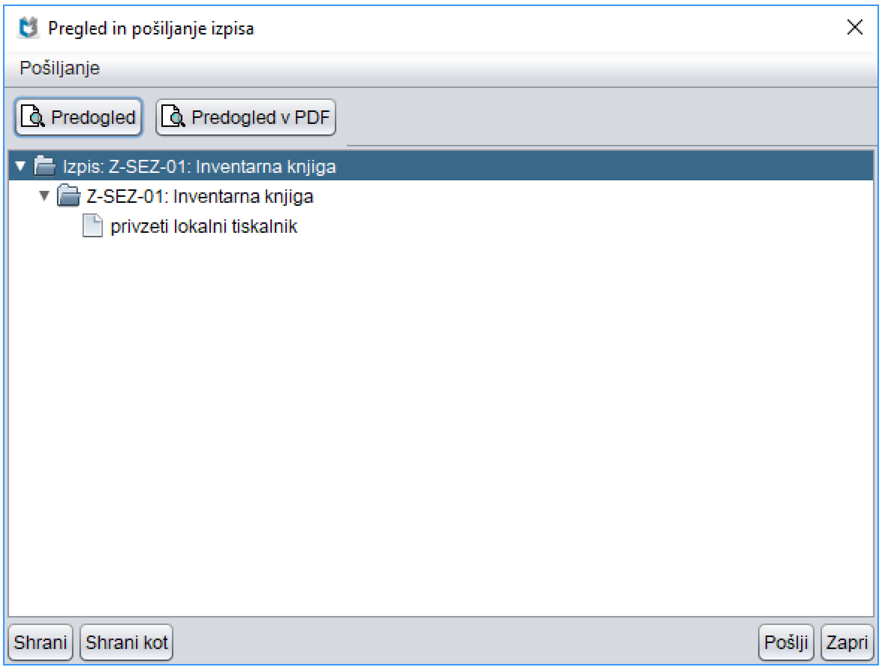


Figure 4.5-1: Overview and sending of created report

14. You can also save the prepared report in a text file (see chapter *4.5.11*) or and XLS file (see chapter *4.5.12*). The content of the text file or the XLS file can be edited later
15. To send a report to its destinations, click the **Send** button.

    The report will be sent to its destinations, i.e. printed out on the printers or sent to the e-mail addresses. In documents, which are sent by e-mail and contain fricatives, the fricatives will not be displayed.
16. To exit the **Overview and sending of created report** window without sending the report to its destinations, click the **Close** button. The report will not be sent to its destinations. If you selected the **Submit and send** method, the report will have been submitted already.

4.5.1 Preview

Procedure

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.
2. Click the **Preview** button.

   The preview window for the prepared report or form will open.
3. To see the next page of the prepared report or form, select **Page / Next page** or press the key <PgDn> (Page Down).

4. To see the previous page of the prepared report or form, select **Page / Previous page** or press the key <PgUp> (Page Up).
5. To see the first page of the prepared report or form, select **Page / First Page** or press the <Home> key.
6. To see the last page of the prepared report or form, select **Page / Last Page** or press the <End> key.
7. To print a report or form on the printer, select **Preview / Print** or click the **Print** button.
8. To close the preview window, select **Preview / Close** or click the **Close** button.

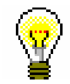
4.5.2 PDF preview

Procedure

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.
2. Click the **PDF preview** button.

   A PDF viewer (e.g. Adobe Reader), which is a global standard for viewing PDF files, will open. You can view and check the prepared report or form, you can even save it to the selected folder on your local disk (as a PDF file) or you can print it (the whole file, selected page range or only selected pages).

   If the PDF viewer is not installed on your computer, after selecting the method, a Windows dialog box will open, where you are asked to choose the program you wish to use to open the prepared report. Close the dialog box by clicking the **Cancel** button. After that, install the PDF viewer (you can download it free of charge at *http://www.adobe.com/*).



> Tip:
>
> Use PDF preview when you wish to save a file with a certain report, which takes a long time to prepare, to a folder on your local disk for example, or when you want to print a limited range of pages of a longer report (e.g.. when you want to print only certain pages or a certain range of pages of a longer report).

After closing the PDF viewer, you will return to the **Overview and sending of created report** window.

4.5.3 Adding a destination

Procedure

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.

2. Select the **Sending / Add destination** method.

   The window for adding a destination will open. You can add a printer, an e-mail address or an e-mail address from your personal address book.

3. Select the type of destination. You can do that in two ways:

   - select it by using the arrow keys <up>, <down> and then press <Enter>
   - click on it to highlight it, then click the **OK** button

   The window for adding destinations will open (see chapters *5.3.2*, *5.3.1* and *5.3.3*).

4.5.4 Editing destinations

Procedure

1. In the **Overview and sending of created report** window, click on the destination to highlight it.
2. Select the **Sending / Properties** method.

   The window for editing destination will open (see chapters *5.3.2* and *5.3.4.1*).

4.5.5 Removing destinations

Procedure

1. In the **Overview and sending of created report** window, click on the destination to highlight it.
2. Select the **Sending / Remove destination** method.

   To remove all destinations, select **Sending / Remove all destinations**.

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

3. Click the **Yes** button.

4.5.6 Adding attachments

Precondition

The attachment is saved in a file in one of the following formats: .pdf, .ps, .jpg, .jpeg, .gif, .tif. The recipient has an e-mail address, to which the form with an attachment can be sent.

Procedure

1. In the **Overview and sending of created report** window, click on the destination (e-mail address) to highlight it. If there is no such destination, you can add one (see chapter *4.5.3*).
2. Select the **Sending / Add attachment** method.

The **Adding an attachment** window will open, which gives you access to all the folders stored on your computer.

3. Find and select the file you wish to attach.

   Under "Select folder", the name of the source folder will be displayed. To select a new folder, click the drop-down list and select the desired disk drive. In the list, which will be displayed under the selected drive, find the desired folder and file. Click on the file to highlight it. The file name will be transferred to "File name".

4. Click the **OK** button.

   Below the destination, the information about the attachment will be displayed: attachment location (i.e. the path to the folder, where the file is saved) and file name.

You can add several attachments to each e-mail address. To add a new attachment, repeat steps 2 to 4.

4.5.7 Removing attachments

Procedure

1. In the **Overview and sending of created report** window, click on the attachment to highlight it.
2. Select the **Sending / Remove attachment** method.

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

3. Click the **Yes** button.

4.5.8 Editing e-mail contents

Procedure

1. In the **Overview and sending of created report** window, click on the e-mail address (destination) to highlight it.
2. Select the **Sending / Edit e-mail content** method.

   The **E-mail content editor** window will open.

3. Change the content.
4. Click the **OK** button.

4.5.9 Setting starting page number in a report

You can set the starting page number for the prepared report.

Procedure

1. In the **Overview and sending of created report** window, click on the report to highlight it.
2. Select the **Sending** / **Set starting page No.** method.

   The **Set starting page number** window will open, where you can define which page number the report will start with.

   Example:

   If you want the report to start with e.g. page number 121, enter the value *121* under "Start numbering at".

3. Click the **OK** button.

Note:

You should set the starting page number only for longer reports (e.g.: H-L-01: Accession book), where the numbering does not consist of the page number and the total number of pages but displays only the page number.

4.5.10 Saving reports in XML file

You can save the prepared report in a XML-file in the previously defined folder, and print it later in the COBISS3/Reports software module.

Procedure

1. In the **Overview and sending of created report** window, click the **Save** button.

   The **Specify file name** window will open. Enter the name of the file, in which the report will be saved.

2. Click the **OK** button.

Once the report is saved, the **Message** window will open containing information about the saved file: file location (i.e. the path to the folder, where the file is saved) and file name. To close the window, click the **OK** button.

To search for a file in the COBISS3/Reports software module, select the desired report definition and then the **Creating reports / Browse stored reports** method. After you select the method, the **Select report** window will open, which gives you access to the predefined folders for storing prepared reports. Find the folder; highlight the file, in which you saved the report and click the **Open** button. The **Overview and sending of created report** window will open, which you can use to send the report to its destination by clicking the **Send** button.

4.5.11 Saving reports in text file

You can save the prepared report in the text file in any folder. You can edit and print the content of the file.

Procedure

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.
2. Click the **Save as** button.

   The **Saving report** window will open which gives you access to all the folders stored on your computer.
3. Under "Save in", find and select the folder.
4. Under "File name", the name of the file will be displayed, which consists of the date, time and name of the report. The file name can be changed.
5. Under "File type", the format of the file, in which the report is saved, will be displayed. The format .txt is defined.
6. Click the **OK** button.

You can find the file, in which the report was saved, using the Explorer (Windows Explorer). You can edit the file using any programme for word processing (e.g. Notepad, WordPad, MS Office Word, etc.).

You can also import text files using the Microsoft Office Excel. This is best used when the report form is defined so that the data, which is saved in the text file, will be appropriately copied to the cells on the worksheet after the import.

4.5.12 Saving reports (statistics) in XLS-file

You can save the prepared statistical report in a XLS-file in any folder. You can edit and print the content of the file.

Procedure

1. In the **Overview and sending of created report** window, click on the report or form to highlight it.
2. Click the **Save as** button.

   The **Saving report** window will open which gives you access to all the folders stored on your computer.
3. Under "Save in", find and select the folder.
4. Under "File name", the name of the file will be displayed, which consists of the date, time and name of the report. The file name can be changed.
5. Under "File type", select the format *Excel Files [UTF-8] (.xls)*.
6. Click the **OK** button.

You can find the file, in which the report was saved, using the Explorer

(Windows Explorer). You can edit the file using MS Office Excel.

4.6 MANAGING REPORT QUEUES

A report queue is a group of selected objects from one class, for which a report, selectable from the list of report definitions, can be sent to the destinations (i.e. printer or e-mail address).

Report queues are usually used to print labels for materials, e.g. when you do not want to print out every label individually, but would like to print more labels at once (e.g. all the labels prepared in one day).

Procedure

1. Select the **System / Queue editor** method.

   The **Queue editor** window will open. A list of report queues will be displayed in the part of the window labelled "List of report queues". The list is sorted alphabetically.

   You will see the queue name, the class name in round brackets, followed by the number of objects currently queuing.

   When you first start working, the list is empty.

2. You can create a new report queue (see chapter *4.6.1*).
3. You can edit a report queue (see chapter *4.6.2*).
4. You can delete a report queue (see chapter *4.6.3*).

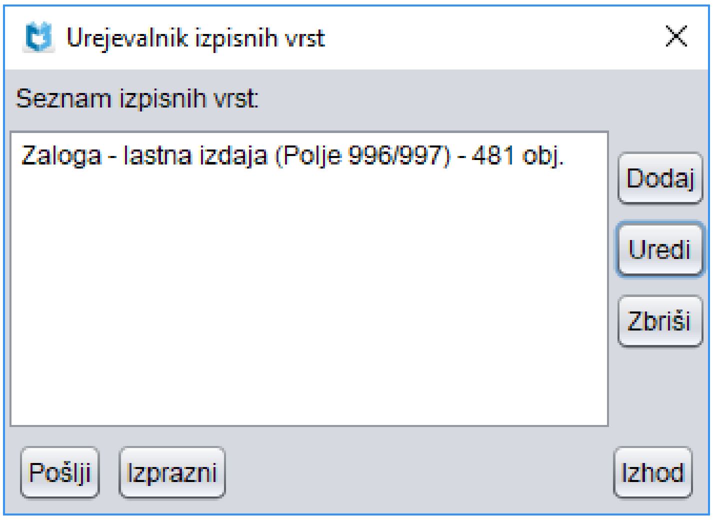


Figure 4.6-1: Queue editor

5. You can send objects from the report queue to destinations (printer or e-mail address) (see chapter *4.6.4*).
6. You can clear a report queue, i.e. remove all objects from the report queue (see chapter *4.6.5*).
7. To exit the **Queue editor** window, click the **Exit** button.

4.6.1 Creating a report queue

Procedure

1. In the **Queue editor** window, click the **Add** button.

   The **Choose class** window will open, which shows the entire structure of COBISS3 software with all its modules and classes.

2. Open the desired module and select the class, in which you wish to create a report queue, and then click the **OK** button.

   The **Report queue** window will open, which shows the class and the author of the report queue.

3. Enter the name of the report queue.
4. Under "Description", you can enter a short description of the report queue.
5. You can add an object to the report queue (see chapter *4.6.1.1*).
6. To remove an object from the report queue, highlight it and click the **Delete** button.
7. Click the **OK** button.

4.6.1.1 Adding an object to report queue

Objects are usually added to the report queue while you perform business transactions. For example: during the process of accessioning and serials check-in, you can add the fields 996/997 to the report queue in order to print labels for the material.

You can also add a new object to the report queue in the queue editor while you create or edit the report queue.

Procedure

1. In the **Report queue** window, click the **New object** button.

   The class search window will open.

2. Find and select the object. More objects can be selected at once.

   Once you select the object, it will be added to the report queue.

Options

If the object is in your workspace, you can add it to the report queue by selecting the method **Object / Add to report queue**, but only if it is stored in one of the classes, which are visible in the part of the browser window, containing modules and classes.

You can also add objects to the report queue, if you select the class first, and then select the method **Class / Add to report queue**. When you select the method, a window with the list of report queues for the selected class will open. When you select the desired report queue, the search window for the selected class will open. Use it to find the required objects, select them and add them to the report queue.

If there are no existing report queues, you can create a new report queue after you select the methods **Object / Add to report queue** or **Class / Add to report queue**.

4.6.2 Editing a report queue

Procedure

1. In the **Queue editor** window, click on the report queue to highlight it.
2. Click the **Edit** button.

   The **Report queue** window will open.
3. You can change the name and description of the report queue.
4. You can add an object to the report queue (see chapter *4.6.1.1*).
5. To remove an object from the report queue, highlight it and click the **Delete** button.
6. Click the **OK** button.

4.6.3 Deleting a report queue

Procedure

1. In the **Queue editor** window, click on the report queue to highlight it.
2. Click the **Delete** button.

   The **Delete report queue** window will open with the question "Do you want to delete report queue?"
3. Click the **Yes** button.

4.6.4 Sending a report queue

Procedure

1. In the **Queue editor** window, click on the report queue to highlight it.
2. Click the **Send** button.

   The **Report definition selection** window will open (see chapter *4.5*, steps 3–15).

   When the reports are sent, the **Clear queue** window will open with the question "Do you want to clear report queue?"
3. To remove all objects from the report queue, click the **Yes** button.
4. If you do not wish to remove the objects from the report queue, click the **No** button.

Options

You can also send the report queue to the printer or to an e-mail address if you first select the class, for which you wish to print a report queue, and then select the method **Class / Create report from queue**, and then select the desired report queue.

4.6.5 Clearing a report queue

Procedure

1. In the **Queue editor** window, click on the report queue to highlight it.
2. Click the **Clear queue** button.

   The **Clear queue** window will open with the question "Do you want to clear report queue?"
3. Click the **Yes** button.

   All objects will be removed from the report queue.

4.7 EDITING LOCAL CODE LISTS

You can use COBISS3 software to edit all local code lists. In order to be able to do that, you need the privilege *ADM_LCL – Local code lists maintenance*.

Procedure

1. Select the **System / Local code lists** method.

   The **Local code lists** window will open, which shows the local code list.

2. In the list, highlight the local code list you wish to edit.

> Note:
>
> *The local code lists* Sublocation (CODE 84), Shelving location (CODE 86) *and* Departments (CODE 301) *are managed by IZUM. These are code lists that define the library organisation and are changed based upon an agreement between the library and IZUM. IZUM must enter these changes into the* Holdings minutes *and/or* Loan minutes *and must also arrange additional settings for the correct operation within the COBISS3 software and the correct display in COBISS+*.

3. Click the **Edit** button.

   The window with the name of the selected local code list will open.

4. To ***add*** new values to the code list, enter the required data in the entry fields under "Code" and "Value", and then click the **Add** button. The new value will be added to the bottom of the code list.
5. To ***edit*** an individual value in the code list, highlight it, enter the new value under "Code" or "Value", and click the **Replace** button.
6. To ***remove*** an individual value from the code list, highlight it and click the **Remove** button.
7. To ***sort*** the values in the code list in ascending alphabetic order, click the **Sort** button. If you click the **Sort** button again, the data will be sorted in descending alphabetic order.
8. If necessary, you can rearrange the order of the values in the code list. To move a value one place ***up***, highlight it and click the **Up** button. To move a value one place ***down***, highlight it and click the **Down** button.
9. To find the desired value in the code list, use the **Find** and **Find next** buttons (see chapter *4.2.1.5.1*).
10. You can change the code list by importing data from the text file, which is saved in any of the folders on your computer (see chapter *4.7.1*).
11. You can save the code list in a text file. The content of the file (i.e. code list) can be edited later (see chapter *4.7.2*).
12. To refresh the data in the COBISS2 software after you entered the changes, click the **Refresh COBISS2** button.

13. To save the changes in the local code list, click the **OK** button.
14. To exit the **Local code lists** window, click the **Close** button.

Along with the existing code lists, you can use up to ten local code lists for any attribute. In order to be able to use these code lists, please inform IZUM. IZUM will prepare the settings in the configuration file and specify which code list will be used for which attribute.

Note:

If you specify the properties of the subfield containing bibliographic data in the COBISS3/Cataloguing software module (the procedure is described in the COBISS3/Cataloguing user manual, see chapter 7.11*), IZUM does not have to be notified about it.*

4.7.1 Importing data from text file to local code list

You can change the code list by importing ata from the text file, which is saved in any of the folders on your computer. The character set used in this file must be Unicode.

Procedure

1. In the window with the name of the selected local code list, click the **Import** button.

   The **Data import method** window will open. Use it to select how you wish to import data.
2. If you wish to overwrite the content of the selected local code list with the content of the text file, click the **Yes** button.
3. If you wish to add new and changed values from the text file to the selected local code list, click the **No** button.

   After clicking **Yes** or **No**, the **Open** window will open, which gives you access to all the folders stored on your computer.
4. Under "Select folder", the name of the source folder will be displayed. To select a new folder, click the drop-down list and select the desired disk drive. In the list, which will be displayed under the selected drive, find the desired folder and text file, which you wish to import to the local code list. Click on the file to highlight it. The file name will be transferred to "File name".
5. Click the **OK** button.

The content of the selected local code list will be overwritten with the values from the text file, from which you imported the data, or the new values from the text file will be added to the selected code list.

4.7.2 Exporting data from local code list to text file

You can export the local code list to the text file in any folder. The character set used in this file must be Unicode. You can edit and print the content of the file.

Procedure

1. In the window with the name of the selected local code list, click the **Export** button.

   The **Save** window will open which gives you access to all the folders stored on your computer.
2. Under "Save in", the name of the source folder will be displayed. To select a new folder, click the drop-down list and select the desired disk drive. In the list, which will be displayed under the selected drive, find the desired folder, to which you wish to save the file containing the local code list.
3. Under "File name", enter the name of the file, to which you wish to save the data from the local code list.

   If you wish to copy the content of the local code list to an existing text file, click on the file in the list to highlight it. The file name will be transferred to "File name".
4. Click the **OK** button.

You can find the file, in which the code list was saved, using the Explorer (Windows Explorer). You can edit the file using any programme for word processing (e.g. Notepad, WordPad, MS Office Word, etc.).

4.8 EDITING JOBS

In the COBISS3/Reports software module you can specify jobs that can be performed later (even outside the library's opening hours). The procedure is described in the *COBISS3/Cataloguing* User Manual (see appendix *I.1.2*), *COBISS3/Acquisitions* User Manual (see appendix *B.1.2*), the *COBISS3/Serials* User Manual (see appendix *B.1.2*) the *COBISS3/Holdings* User Manual (see appendix *A.1.2*), the *COBISS3/Loan* User Manual (see appendix *A.1.1*) and the *COBISS3/Interlibrary Loan* User Manual (see appendix *B.1.2*).

For stored jobs you can re-set the date and time of when they are performed as well as their frequency. Some stored jobs can also be deleted. The list of stored jobs is accessible from the **Job editor** window you open in the browser.

Procedure

1. Select the **System / Job editor** method.

   The **Job editor** window will open, which shows the list of stored jobs.
2. Click a job name to select a job.
3. You can edit a job (see chapter *4.8.1*).
4. You can delete a job (see chapter *4.8.2*).
5. To exit the **Job editor** window, click the **Exit** button.

4.8.1 Editing a job

In stored jobs you can reset the date and time of when they are performed as well as their frequency.

Procedure

1. In the **Job editor** window, click on the job to highlight it.
2. Click the **Edit** button.

   The **Edit job** window will open.
3. You can change the time and date of when the job will be performed as well as its frequency.

   Under "Execution time (dd.MM.yyyy HH:mm:ss)" enter or set the execution date and time.

   If you wish to set up the frequency of repetition, click the **To be repeated** list and select the desired value.

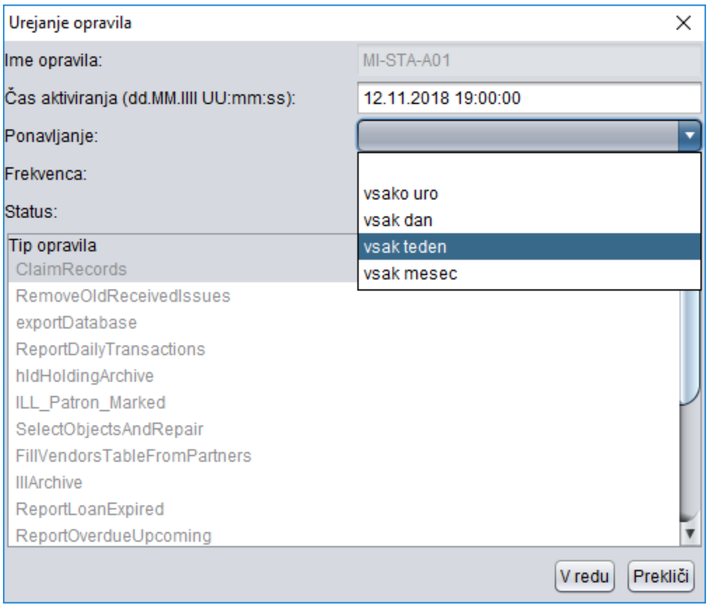


Figure 4.8-1: Repetition of job

Under "Frequency", enter the frequency of repetition or set the interval, in which the job should be performed.

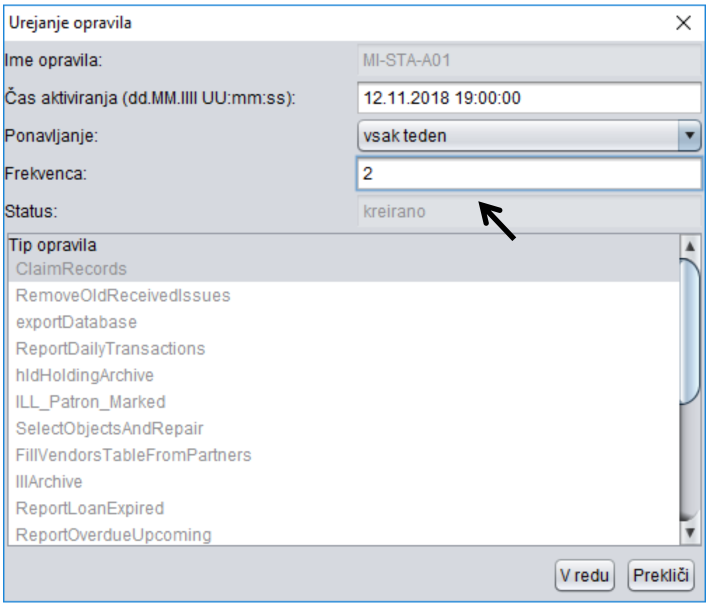


Figure 4.8-2: Frequency of job repetition

The values you enter under "To be repeated" and under "Frequency" specify the time between the completion and repeated execution of a periodic job.

Example:

If you wish that a certain job is performed periodically every 14 days, select the value *every day* under "To be repeated" and then the value *14* under "Frequency", or select the value *every week* under "To be repeated" and the value *2* under "Frequency" (see *Figure 4.8-1* and Figure *4.8-2*).

If you wish that a certain job is performed periodically every 3 days, select the value *every day* under "To be repeated" and then the value *3* under "Frequency".

If you wish that a certain job is performed periodically every half-year, select the value *every month* under "To be repeated" and then the value *6* under "Frequency".

4. Click the **OK** button.

4.8.2 Deleting a job

You can delete a job from the list of stored jobs (regardless of the job status) if the job was not created automatically with loan procedures (e.g. sending messages about a forthcoming loan period expiry date, forthcoming overdue notice …).

Procedure

1. In the **Job editor** window, click on the job to highlight it.
2. Click the **Delete** button.

   The **Delete job** window will open with the question: "Do you want to delete job?"
3. Click the **Yes** button.

5 SETTINGS

The following chapter describes how to change the font and the login procedure to the lending department. It also tells you how to edit user destinations and logical destinations, to which reports are sent (see also chapter *4.5*).

The introduction described above is followed by instructions for editing your personal address book, which you can use to store e-mail addresses of your business contacts. The last part contains instructions on how to send a message to all currently logged-in users, how to read the last sent message, how to read a message sent by IZUM concerning the functioning of the COBISS system, how to view messages from the COBISS3 software sent during your login, how to prepare a notification that will appear in COBISS+, how to send remarks and suggestions about the functioning of COBISS3 software by e-mail, how to refresh the settings after changing the parameters in the configuration file, how to check for server errors, how to show the activities log and the COBISS3 log, how to perform a network test, how to check which system users are currently logged into the COBISS3 software and how to examine the personal data processing in accordance with PDPA (Personal Data Protection Act).

All settings are bound to your username. When you exit the browser, the window size will be saved automatically. All other user settings – font style and size, user destinations, logical destinations, personal address book, queries, shortcuts and hit list formats – will be saved when you define your individual user settings.

Subchapters:

- Changing the font
- Login to the lending department
- Defining user destinations
- Editing logical destinations
- Editing your personal address book
- Sending messages to other users
- Reading the last sent message
- Notifying the users
- Viewing messages
- Preparing the COBISS+ notification
- Sending remarks

- Refreshing the settings
- Viewing server errors
- Viewing activities log
- Viewing COBISS3 log
- Network test
- Viewing logged in users
- Examination of personal data processing in accordance with PDPA (Personal Data Protection Act)

5.1 CHANGING THE FONT

You can change the font type and size for the display of text in the user interface (i.e. browser, search window, editor and viewer).

Procedure

1. Select the **System / Settings / Set font** method.

   The **Set font** window will open. Use it to change the font type and size.

2. Under "Font" and "Size", select the desired values.

   Under "Font" you will see a list of all the font types, which are installed on the computer and under "Size" you will see all font sizes which you can select. The font sizes are expressed in points (pt).

   After you select the values from the drop-down lists, the text *Print example* will be displayed in the selected font type and size.

   To return to the default font type (*Arial Unicode MS*) and size (*12*), click the **Default** button.

3. Click the **OK** button.

The new font setting is visible immediately, however, you need to re-log for the COBISS3 software to fully adjust to the new setting.

5.2 LOGIN TO THE LENDING DEPARTMENT

In libraries, where loan is organised by departments, you are logged into the department selected as default by the administrator of local applications on the **Training** portal. If you wish, you can log into another department that you have access to:

Procedure

1. In the part of the window containing modules and classes, select the **Department** class (in the Loan or Application administration software module).
2. Select the **Class / Transition to another department** method.

   The **Select department** window will open containing a list of departments you can access with your username.
3. To select a department, click on it to highlight it and click the **OK** button.

In the title bar you will see the department ID and the name of the department you logged in to.

Options

You can also change the department you are logged in to by selecting the **System / Settings / Lending department** method.

5.3 DEFINING USER DESTINATIONS

User destinations are considered when preparing and sending reports, whose definitions do not contain predefined destinations, such as the *Basic report*.

Procedure

1. Select the **System / Settings / User destinations** method.

   The **User destinations** window will open. In the part of the window labelled "Destinations" you will see a list of destinations, which you have already defined.

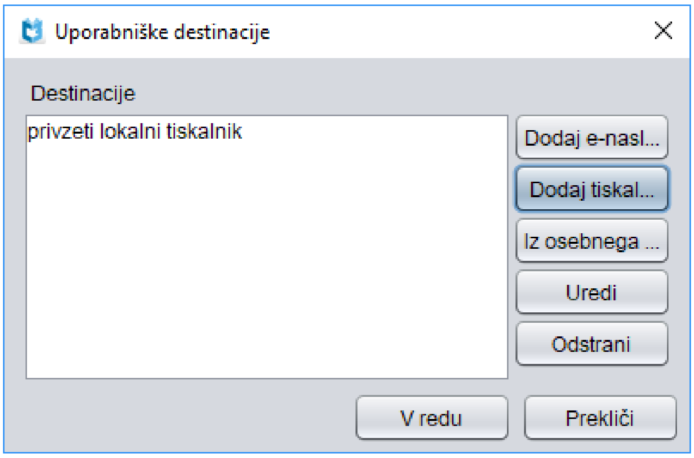


Figure 5.3-1: User destinations

   On the right side, there are buttons for adding, editing or removing user destinations:

   - to add an e-mail address, click the **Add e-mail** button (see chapter *5.3.1*)
   - to add a printer, click the **Add printer** button (see chapter *5.3.2*)
   - to add an e-mail address from your personal address book, click the **From personal address book** button (see chapter *5.3.3*)
   - to edit a destination, click on it to highlight it, and then click the **Edit** button (see chapter *5.3.4*)
   - to remove a destination, click on it to highlight it, and then click the **Remove** button (see chapter *5.3.5*)

2. Click the **OK** button.

Tip:

The user destination is usually a printer.

5.3.1 Adding an e-mail address

Procedure

1. In the **E-mail** window, enter the recipient e-mail address**.**
2. Click the **OK** button.

The e-mail address will be added to the group TO – main recipients.

5.3.2 Adding a printer

Procedure

1. In the **Printer** window, select a printer and define the number of copies you wish to print.

   Under "Printer", you can select from all local printers, which are accessible from your computer. Do not change the default value *default local printer*, if you wish to send reports to the printer, which is defined as the default printer on your personal computer.
2. Define the details for the selected printer (see chapter *5.3.2.1*).
3. Click the **OK** button.

5.3.2.1 Defining details for selected printer

Procedure

1. In the **Printer** window, click the **Details** button.

   The **Details** window will open.
2. Define more specific information about:

   - the printing mode
   - the printer type
   - the printer subtype
   - the printing style
   - the printing orientation

   Under "Printing mode" you can select between textual and graphical printing. The default setting is *graphics*, because it is easier to print Unicode characters.

   In textual printing, where the selection is limited to a small number of characters, the report will be converted into an LST file, which will be converted into a file containing printer commands which depend on the printer you selected. In COBISS2 software, printing takes place in a similar way. If the report is prepared in LST format, one page usually contains up to 64 lines maximum.

   If you select the textual printing mode, you also have to define the printer type. You can choose between several types of printers. When installing COBISS3 software, the drop-down list "Printer type" will already contain type values, however, the content of the drop-down list can be different in different libraries. The parameters, on the basis of which a code list is created, are defined in the configuration file of the library.

The printer subtype only has to be defined for thermal printers, which are used for printing labels. Some printer types (e.g. Zebra S4M) have specific characteristics, which can be set up through printer configuration. Along with the printer type (e.g. *Thermal Zebra*) you also have to define the printer subtype (e.g. *S4M*). Under "Printer subtype", you can select from the values, which are defined in the configuration file of the library to make sure that the printer will be set up properly (set up of the thermal print head temperature, printing speed, coordinate system shift etc.).

When using graphical printing, you cannot select the printer type and subtype, because graphical printing can only be carried out using a laser printer.

Note:

When using textual printing, be careful when you select the printer type.

Under "Printing style", you can select values from the drop-down list, which determine whether you want to print on one or both sides as well as the type of binding. The default value is *single sided*.

Under "Orientation", you can change the page orientation when printing by selecting values from the drop-down list. The default value is *portrait*.

3. Click the **OK** button.

5.3.3 Adding an e-mail address from your personal address book

Procedure

1. In the **Select personal address book entry** window, select an e-mail address by:
   - using the arrow keys <up>, <down> and press <Enter>
   - click on the desired value to highlight it, then click the **OK** button

The selected e-mail address will be added to the group TO – main recipients.

5.3.4 Editing a destination

You can edit the settings of a particular destination, i.e. an e-mail address or a printer.

Procedure

1. In the **User destinations** window, click on the desired destination to highlight it.
2. Click the **Edit** button.

Depending on the type of destination you selected, either the **E-mail** window (see chapter *5.3.4.1*) or the **Printer** window (see chapter *5.3.4.2*) will open.

5.3.4.1 E-mail addresses

The **E-mail** window has three tabs to select ***groups of addresses***:

- **TO** – main recipients
- **CC** – recipients who receive a copy
- **BCC** – recipients who receive a copy but are hidden to all other recipients

In each group, you can define one or more recipients which represent a ***set of e-mail addresses*** and will be added to the list of destinations when you close the **E-mail** window.

> Example:
>
> You defined the department for interlibrary loan of the University of Maribor as the main recipient (TO:). Its e-mail address is *illukm@uni.mb.si*. The group of addresses, which receives carbon copies (CC:), contains two recipients: *ukm@uni-mb.si* and *janezn@uni-mb.si*.
>
> The following set of e-mail addresses will be added to the list of destinations: TO: *illukm@uni-mb.si*, CC: *ukm@uni-mb.si*, CC: *janezn@uni-mb.si*.

Procedure

1. Click on the desired tab. Depending on the group of addresses you selected, the name of the group will be displayed above the list of e-mail addresses, which will contain those e-mail recipients who were previously added to this group.

   > Example:
   >
   > If you click on the **CC** tab, the heading above the list will be "CC addresses".

2. To ***add*** an e-mail address to a selected group, click the **Add** button. The **E-mail** window will open. Enter the recipient's e-mail address and click the **OK** button to confirm it. The **E-mail** window will close again. The e-mail address will be transferred to the **E-mail** window to the list of e-mail addresses of recipients within the same group.
3. To ***edit*** an address within a selected group, click on it to highlight it, and click the **Edit** button. The **E-mail** window will open. Edit the recipient's e-mail address. To confirm the change, click the **OK** button.
4. To ***remove*** an e-mail address from the selected group, highlight it on the list and click the **Remove** button. The **Confirm** window will open with the question "Are you sure you want to remove?" Click the **Yes** button. The window will close and the recipient will be removed from the list of recipients of that group of e-mail addresses.

5. Under "Format" select the format, in which you wish to send the report:
   - *TXT* for reports in textual format
   - *PDF* for reports, which the recipient will have to read using Adobe Acrobat Reader
   - *HTML* for reports, which the recipient will have to read using a web browser
   - *RTF* for reports, which the recipient will have to read using Microsoft Word
   - *text ("Tab" Delimited)* for reports, which the recipient will have to read using Microsoft Excel
   - *text attachment* for reports, which the recipient will have to read using any programme for working with text files (Notepad, WordPad …)
6. Click the **OK** button.

> Note:
>
> *Each set of e-mail addresses must contain at least one e-mail address from the TO group of addresses.*

5.3.4.2 Printers

The **Printer** window displays the printer settings. The process of editing these settings is the same as when you add a printer (see chapter *5.3.2*).

5.3.5 Removing a destination

A destination can be removed from the list of user destinations.

Procedure

1. In the **User destinations** window, click on the destination to highlight it.
2. Click the **Remove** button.

   The **Confirm** window will open with the question "Are you sure you want to remove?".
3. Click the **Yes** button.

5.4 EDITING LOGICAL DESTINATIONS

All standard reports have predefined logical destinations which define where a report will be sent. For example: in the COBISS3/Acquisitions module, the logical destination "Printer – Acquisitions" is used when sending orders, cancellations, claims, etc.

Every user can change the logical destination values for their individual use. The changed value of the logical destination will be displayed in round brackets and will be used instead of the default logical destination.

You can view the default settings of the logical destination, if you select the logical destination and click the **Default (description)** button.

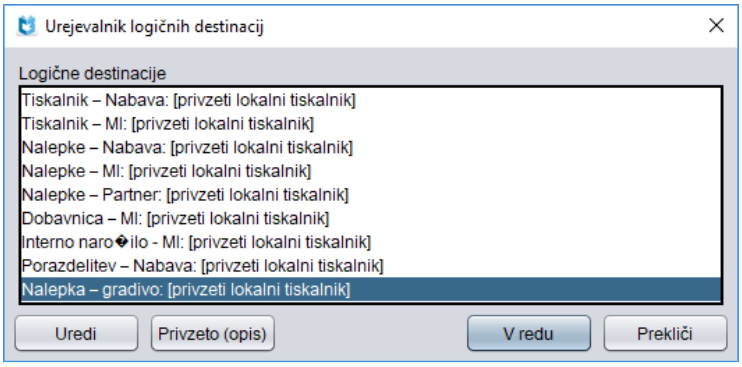


Figure 5.4-1: Logical destinations

Procedure

1. Select the **System / Settings / Logical destinations** method.

   The **Logical destinations editor** window will open. In the part of the window labelled "Logical destinations" you will see the list of logical destinations. Next to the name of the logical destination (e.g. "Printer – Acquisitions") the value of the logical destination will be displayed in square brackets. This value is defined for each library when the COBISS3 software is installed and applies to all users in the library.

2. To highlight a destination:

   - select it using the arrow keys <up>, <down>
   - click on it

3. Click the **Edit** button.

   The **User destinations** window will open, which you use to edit the selected logical destination (see chapter *5.3*).

4. Click the **OK** button.

The destination you added will be displayed in round brackets in front of the logical destination.

5.5 EDITING YOUR PERSONAL ADDRESS BOOK

Your personal address book is used to save e-mail addresses of your business partners.

Procedure

1. Select the **System / Settings / Personal address book** method.

   The **Personal address book editor** window will open. The list contains all those e-mail addresses which you have already added to your personal address book. The buttons on the right side of the window enable adding, editing and removing e-mail addresses.
2. To ***add*** a new e-mail address, click the **Add** button (see chapter *5.5.1*).
3. To ***edit*** an e-mail address, click on it to highlight it, and click the **Edit** button (see chapter *5.5.1*)
4. To ***remove*** an e-mail address, click on it to highlight it, and click the **Remove** button. The **Confirm** window will open with the question "Are you sure you want to remove?". Click the **Yes** button. The window will close; the e-mail address will be removed from the list of e-mail addresses in your personal address book.
5. Click the **OK** button.

5.5.1 Adding and editing e-mail addresses

Procedure

1. In the **Entry editor** window, you can enter the new e-mail address or edit the existing e-mail address.
2. Click the **OK** button.

The e-mail address will be added to the group TO – main recipients, or will be edited.

5.6 SENDING MESSAGES TO OTHER USERS

You can send a message to all users, which are currently logged in to COBISS3 software in the library.

Procedure

1. Select the **System / Messages / Message to all users** method.

   The **Message to all users** window will open.

2. Enter the text of the message.
3. Click the **OK** button.

   The **Message** window will open, where you will see the username of the person that sent the message, the date and the time of the message and its contents.

Options

You are alerted about the message from the COBISS3 software with a message on the desktop (Desktop Alert) and the icon in the taskbar.

5.7 READING THE LAST SENT MESSAGE

You can read the last message sent by one of the users.

Procedure

1. Select the **System / Messages / Read last message** method.

   The **Message** window will open, displaying the username of the person who last sent a message, the time and date of sending, as well as the message content.

2. Click the **OK** button.

You can read the last sent message before the server is restarted. During the restart the message will be deleted.

5.8 NOTIFYING THE USERS

In the COBISS3 software you can read messages which are prepared in IZUM and refer to the functioning of the COBISS system (e.g. installation of a new software version, announced or unannounced interruptions, etc.).

No later than one hour after a new message is published in IZUM, the **COBISS Messages** window will open to all users logged into the COBISS3 software. The users can view the new message, as well as all previously published messages whose validity did not expire.

If you were not logged into the COBISS3 software at the time the message was published, the **COBISS Messages** window will open immediately after you log in.

Procedure

1. Select the **System / Messages / Show COBISS messages** method.

   The **COBISS messages** window will open. The list of published messages, whose validity did not expire, is displayed in the part of the window labelled "List of COBISS messages". The list is arranged by publication date, so the last published message is displayed at the top of the list.

   Unread messages are written in green, read messages are written in black.

2. Click on the message that you wish to read to highlight it, and click the **Open** button.

   The **COBISS Message** window will open and display the message contents.

3. To close the window containing message contents, click the **OK** button.
4. To close the window containing the list of COBISS messages, click the **Close** button.

Options

You are alerted about the message from the COBISS3 software with a message on the desktop (Desktop Alert) and the icon in the taskbar.

5.9 VIEW MESSAGES

You can view messages sent by the users of the COBISS3 software among themselves, messages that are prepared in IZUM and are related to the operation of the COBISS system as well as some software messages (e.g. notification when a report is sent to the printer.

Procedure

1. Select the **System / Messages / View messages** method.

   The **Messages** window will open, which displays messages arranged by publication date, where the last message is shown at the top of the list. Next to each message, the type of message is displayed as well as the username of the person who sent the message with the date, time and content of the message.

2. If you want to delete the messages, click the **Remove all** button.
3. To close the **Messages** window, click the **Close** button.

You can view the messages until you logout of the COBISS3 software. After that the messages are deleted.

Options

You can also view the messages with the **Messages** button located in the status bar of the browser.

You can also view the messages by clicking the option in the taskbar and selecting the icon. By clicking the right mouse button, a shortcut menu will open, where you select the **View messages** method.

You are alerted about the message from the COBISS3 software with a message on the desktop (Desktop Alert) and the COBISS3 icon in the taskbar.

5.10 PREPARING THE COBISS+ NOTIFICATION

In the COBISS3 software, you can enter the text that will appear in COBISS+ above the material data in the display of the selected search result in our library when a user selects your library on the Virtual library of Slovenia webpage for searching in library catalogues in the drop-down list. If your library has more departments, you can prepare the notification for the library as a whole and notifications for individual departments (see chapter *5.10.1*).

> Tip:
>
> If the entire text of the notification is not shown in COBISS+, click **Show more**.

To edit the notification, you must have the privilege *ADM_NOTIF – Preparation of COBISS+ notification*.

Procedure

1. Select the **System / Messages / Prepare COBISS+ notification** method.

   The **COBISS+ notification** window will open.

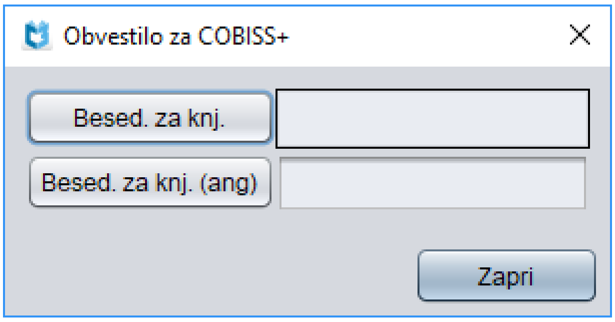


Figure 5.10-1: Window for preparing the COBISS+ notification

2. Click the **Text for library** button. The **Text for library** window will open, where you can enter the text that will appear in COBISS+ when your library is selected. If the text is already entered, you can ***update*** it, or ***delete*** it when it is no longer up-to-date.
3. If you wish to prepare the notification also in the English language, click the **Text for library (eng)** button. The **Text for library (eng)** will open, where you can enter the desired text (usually the translation of the text). If the text is already entered, you can ***update*** it, or ***delete*** it when it is no longer up-to-date. Users will see the English text if they select the English language for display as they enter COBISS+.
4. To save the changes (entering, updating or deleting the text), click the **OK** button in the **Text for library** or **Text for library (eng)** window.

The updates appear in COBISS+ as soon as you click the **OK** button in the window for entering the text.

5. To exit the **COBISS+ notification** window, click the **Close** button.

You can use HTML elements when forming the text, e.g. if the text should appear in bold in COBISS+ enter it between and . If you wish it to appear in italics, enter it between and . You can also add hyperlinks to other pages and create paragraphs.

A hyperlink to another web page must be entered as follows:

<a href="http://<*link*>"><*name of the link*>

> Example:
>
> Reference service Ask a Librarian
>
> In the text that will appear in COBISS+, the link to the web page with the presentation of the reference service Ask a Librarian will be displayed as Reference service Ask a Librarian.

> Tip:
>
> When writing the text or information that we wish to appear, the “less is more” rule should be applied as texts that are too long tend to discourage people from reading. Also, use bold text only to emphasize the most important parts of the text and not the entire text.

5.10.1 Preparing the notification in libraries with departments

If your library has more departments, you can prepare:

- a notification for the library as a whole, and
- a notification for individual departments

Procedure

1. Select the **System / Messages / Prepare COBISS+ notification** method.

   The **COBISS+ notification** window will open.

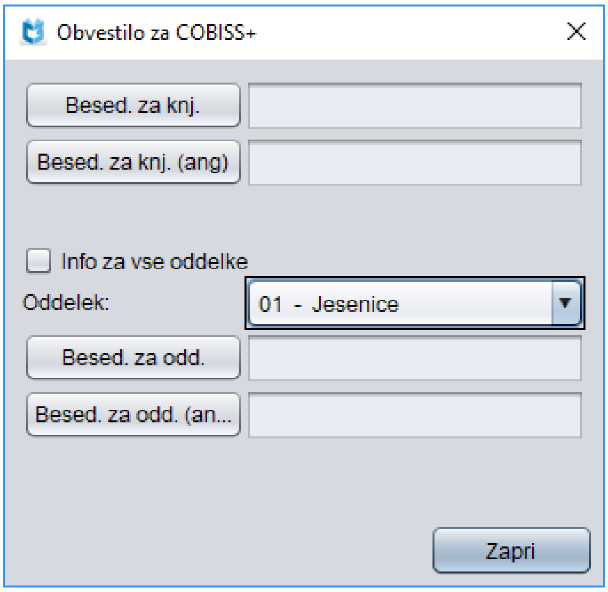


Figure 5.10-2: Window for preparing the COBISS+ notification in a library with departments

2. Prepare the notification for the library as a whole (see chapter *5.10.1.1*).
3. Prepare the notification for individual library departments (see chapter *5.10.1.2*).
4. To exit the **COBISS+ notification** window, click the **Close** button.

5.10.1.1 Preparing the notification for the library as a whole

If you wish to prepare a notification for the library as a whole, click the **Text for library** or **Text for library (eng)** button in the **COBISS+ notification** window (see *Figure 5.10-2)*, and enter the desired text. If the text is already entered, you can ***update*** it. When the text is no longer up-to-date, you can ***delete*** it.

The text that you will enter into the **Text for library** window and into **Text for library (eng)** window will appear in COBISS+ when all the departments or one individual department of your library is selected, for which no special notification is prepared (see chapter ***Error! Reference source not found.****)*.

5.10.1.2 Preparing the notification for individual library departments

If you wish to prepare ***a notification for an individual department***, firstly select the relevant department form the drop-down list in the **COBISS+ notification** window (see *Figure 5.10-2)* under "Department", then click either the **Text for dpt.** button or **Text for dpt. (eng)** button and enter the text for this department.

The text will be displayed in COBISS+ when this department of your library is selected.

Note:

When preparing a notification for an individual department, the »Info for all departments« checkbox must not be ticked.

If you wish to prepare ***a uniform notification for all the departments***, tick the “Info for all departments” checkbox in the **COBISS+ notification** window and then click either the **Text for dpt.** button or **Text for dpt. (eng)** button and enter the desired text. When doing this, it does not matter which department has been selected from the drop-down list under “Department”.

The text will be displayed in COBISS+ when any department of your library is selected.

Note:

If you enter a notification for the entire library as well as a notification for the selected department, the text for the department will be displayed in COBISS+ when displaying the search result in the selected department; when displaying the search result in other departments or in all departments of your library the text for the library will be displayed.

If text for departments is already entered, you can ***update*** it. When the text is no longer up-to-date, you can ***delete*** it.

Tip:

If you wish to prepare a similar notification for most departments, enter a uniform text for all the departments (firstly tick the “Info for all departments” checkbox, then click the **Text for dpt.** button or the **Text for dpt. (eng)** button and then enter the text). Then modify the text for individual departments as appropriate (firstly select the relevant department from the drop-down list under "Department", then click either the **Text for dpt.** button or the **Text for dpt. (eng)** button and modify the text; before entering the text, make sure that the "Info for all departments" checkbox is not ticked.

Tip:

If you wish to delete a notification for ***all the departments***, ***firstly*** tick the "Info for all departments" checkbox in the **COBISS+ notification** window, then click the **Text for dpt.** button or the **Text for dpt. (eng)** button and delete the entered text. When doing this, it does not matter which department has been selected from the drop-down list under "Department".

5.11 SENDING REMARKS

You can send remarks and suggestions, related to the functioning of COBISS3 software, by e-mail directly to IZUM.

Procedure

1. Select the **System / Messages / Send remarks** method.

   The **Send remarks** window will open.
2. Under "To", the e-mail address, to which you send the message, will be displayed. You can change the e-mail address or add another e-mail address.
3. Under "From", the e-mail address, entered under the attribute "E-mail" for the username, which you used to log in, will be displayed. You can change the value.
4. Under "Subject", the title of the message will be displayed. You can change it.
5. Under "Text", enter the text of the message you wish to send by e-mail.
6. Click the **OK** button.

5.12 REFRESHING THE SETTINGS

After changing the settings (e.g. changing local code lists, loan parameters, department data etc.) you have to refresh the data.

Procedure

1. Select the **System / Server / Refresh settings** method.

The changes will not be visible to other users until they logoff and back on again to the COBISS3 software.

5.13 VIEWING SERVER ERRORS

Unexpected failures and errors, which might occur while using the software (e.g. the communication was interrupted), are collected in a file. If you receive a message about a server error, inform IZUM, who will recover the error on the basis of its description.

Procedure

1. Select the **System / Server / Show server errors** method.

   A window containing a list of server errors will open.

   You can see the details of every server error, if you click on it to highlight it, and then click the **Details** button.

   The **Error** window will open with the error description. If the list contains more than one server error, move to the next error by clicking the **Next** button. To see the previous error, click the **Previous** button. To close the window, click the **OK** button.

2. Click the **Cancel** button.

5.14 VIEWING ACTIVITIES LOG

Information about performing some of the methods in the COBISS3 software is entered into the activities log.

Procedure

1. Select the **System / Server / Activities log** method.

   The **Activities log** window will open, where the current number, the date and the time of the method execution as well as the name of the used method is entered.

2. Click the **Close** button.

Note:

The activities log contains information about method executed in the COBISS3 software in the time of the current COBISS3 login to the time of executing the method of the activities log display and the information is related to the username.

5.15 VIEWING COBISS3 LOG

All software messages about the work in the COBISS3 software are entered in the COBISS3 log.

Procedure

1. Select the **System / Server / COBISS3 log** method.

   A text file will open.

Note:

The file contains software messages from the login to the COBISS3 software to the moment of executing the method of the COBISS3 log display and the messages are related to the username.

5.16 NETWORK TEST

While you use COBISS3 software, you can test the network speed and check the response time between the server and the client.

Procedure

1. Select the **System / Server / Network test** method.

   The **Network tester** window will open. Use it to perform the test.

2. Click the **Test** button.

In the window, you will see the last response time between server and client and the average of all responses. The time is expressed in milliseconds (ms).

5.17 VIEWING LOGGED IN USERS

You can check which system users are currently logged into the COBISS3 software.

Procedure

1. Select the **System / Server / Show logged in users** method.

   The **List of logged in users** window will open, where the data about the currently logged in users is displayed (name and surname, username and e-mail of the system user).

2. You close the window by clicking the **OK** button.

5.18 EXAMINATION OF PERSONAL DATA PROCESSING IN ACCORDANCE WITH SLOVENE PERSONAL DATA PROTECTION ACT (ZVOP)

In accordance with the first paragraph of Article 24 (5) of the Personal Data Protection Act, which addresses personal data protection (PDPA-1-OCT1; Official Gazette of the Republic of Slovenia, No 94/07), we ensured proper traceability in the procedures of library members' personal data processing.

Examination of library members' personal data processing by librarians (library members' personal data, data on material borrowed from home library or through interlibrary loan, members' requests for purchase of material, etc.) are recorded in some modules of the COBISS2 and COBISS3 software and the data is saved and protected in special and secured files on the server (the so called LOG-files, i.e. loggers). Library members' personal data is also recorded, if it has been processed by IZUM's staff through application software.

We also prepared software for examination of loggers, i.e. LOG-files, because the recording itself does not ensure that a user (librarian or IZUM's staff) processed (examined, printed, entered, corrected, etc.) personal data in accordance with the laws, regulations, rules, standards, principles of a profession and code of ethics.

The examinations are performed every month for the previous month in accordance with the risk assessment and with the procedure described in chapter *5.18.5* by the authorised person in the library. As the loggers contain personal data, each insight of the authorised person into the loggers is also recorded. The authorized person can examine the data about personal data processing in loggers for the previous month until the 8th working day of the current month. When this period expires, the loggers are archived in accordance with PDPA and are available only upon specific request and if the insight traceability is ensured again.

The authorised person in the library can examine data about member's personal data processing by the users for the current month as it is recorded.

Note:

Library members' personal data processing by users is also recorded simultaneously in the COBISS2 software, but it is transferred to the logger (LOG-file designated for examination) with a one day delay. If, exceptionally, you want to get insight to the logger for the current day (e.g. inspection), please send your request to podpora@izum.si.

IZUM will immediately transfer the data recorded up until the moment when the request was granted.

The authorised person in the library requires a privilege of *ADM_REV – Examination of personal data processing* to examine the loggers. The privilege is granted by IZUM on the basis of the submitted Statement on the privilege to control the loggers on library members' personal data processing. The authorized person in the library must fill out the statement and send it, signed and stamped, back to IZUM. The form is available on the **Training** portal (select *Managing usernames and privileges*, then select *Forms*) and can be printed out only by the local applications administrator.

Based on the privilege *ADM_REV – Examination of personal data processing*, the authorised person in the library has access to the logger's content after logging in to the COBISS3 software. He/she can choose among four types of examinations:

- library members' personal data processing by users (the list shows which users have recently processed the library members' personal data, what kind of processing they performed (software points) and how many times)
- library members' personal data processing by selected user – summary data (the list shows for the selected user how many notes he/she made in the logger for a particular date of processing found on the basis of search terms)
- library members' personal data processing by selected user (it includes a list of all the processing for the selected user for a particular day)
- personal data processing of the selected library member (it includes a list of all the processing of the selected library member for the most recent period)

5.18.1 Library members' personal data processing by users

Procedure

1. Select the **System / Examination of processing (ZVOP) / Show personal data processing – all users** method.

   The **Examination of processing (ZVOP)** window will open containing the *Library members' personal data processing by users* list. The list shows the data on all the users who have recently processed library members' personal data. For each user, the list displays what the user processed (software points) and how many times.
2. To print the displayed data, click the **Print** button.
3. To close the window, click the **Exit** button.

5.18.2 Library members' personal data processing by selected user – summary data

Procedure

1. Select the **System / Examination of processing (ZVOP) / Show personal data processing – selected user (summary data)** method.

   The **Users** window will open.

2. Click on the username to highlight the user whose data you want to examine and click the **OK** button.

   The **Personal data processing** window will open.

3. Enter the search term to the entry field (any data from the logger, e.g. software point label, date of processing, member's name, etc.; you can enter the whole term or truncate it) and click the **OK** button.

   The **Examination of processing (ZVOP)** window will open containing the *Library members*' *personal data processing by selected user – summary data* list. The list displays for the selected user how many notes are found based on the search term and the search term itself, when the user processed the data and how many times it was processed.

4. To print the displayed data, click the **Print** button.
5. To close the window, click the **Exit** button.

5.18.3 Library member's personal data processing by selected user

Procedure

1. Select the **System / Examination of processing (ZVOP) / Show personal data processing – selected user** method.

   The **Users** window will open.

2. Click on the username to highlight the user whose data you want to examine and click the **OK** button.

   The **Processing date** window will open.

3. Enter the examination date for the selected user to the entry field and click the **OK** button.

   The **Examination of processing (ZVOP)** window will open, displaying the information about library members' personal data processing for the selected user on the selected day.

4. To close the window, click the **Exit** button.

Note:

A printing option is not provided, as it would reveal personal data and as such would have to be treated in accordance with PDPA.

5.18.4 Personal data processing of the selected library member

Procedure

1. Select the **System / Examination of processing (ZVOP) / Show personal data processing – selected member** method.

   The **Search – Member** search window will open.

2. Find and select the member for whom you want to know which users processed their personal data.

   The **Examination of processing (ZVOP)** window will open which displays the information on all the users who have recently processed personal data for the selected member.

3. To close the window, click the **Exit** button.

Note:

A printing option is not provided, as it would reveal personal data and as such would have to be treated in accordance with PDPA.

5.18.5 Control procedure

Logger’s examination is based on the *Library members’ personal data processing by users* list.

Procedure

1. Based on the list, select the following number of users for examination:

   - at least 2 users or all the users in libraries with 1–5 users
   - at least 3 users in libraries with 6–15 users
   - at least 4 users in libraries with 16–50 users
   - at least 5 users in libraries with more than 50 users

   You only take into consideration the users who had access to library members’ personal data, which you can see from the *Library members’ personal data processing by users* list. Every month, different members are selected, including IZUM’s staff. In cases of doubt of improper or unauthorised processing, the same user is selected again next month.

2. The authorised person examines the loggers for the selected users and prepares a separate report for each user (see appendix *C.4*).

3. Select the **System / Examination of processing (ZVOP) / Print Report on the examination of personal data processing** method, if you want to print the Report on the examination of personal data processing form.

   The Report on the examination of personal data processing contains the following data:

   - which library the examination refers to
   - who performed the examination of processing, when and for which month
   - for which user the examination was performed
   - if the processing was in accordance with the work tasks and authorisations of the user or if any discrepancies or irregularities were found
   - if the user was interviewed (in case of any irregularities or questionable situations only)
   - which measures are required (in case of any irregularities or questionable situations only)

4. The authorised person forwards the signed reports to the manager or to the person in charge of personal data protection.

6 TIPS FOR DATA ENTRY

The following chapter describes how to enter characters and data, which require a formatted entry.

Subchapters:

- Characters
- Types of data

6.1 CHARACTERS

6.1.1 Entering all characters

The characters, which you can enter, are dependent upon the operating system you are using (Windows, Linux, Mac, etc.) and the keyboard, which is installed on your personal computer.

Windows users can use Windows Character Map to enter diacritical characters, which cannot be found on the keyboard. If you are using Windows XP, the procedure (of entering diacritical characters) is as follows[1]:

Procedure

1. Click on start in the task bar.
2. Point the mouse pointer to **All Programs / Accessories / System Tools / Character Map** and click.

   The **Character Map** window will open. Every font contains a different character set, so make sure to select the desired font first and then select the character. Click on the character to select it, then click Select.
3. Click Copy.
4. Activate the COBISS3 software window (click anywhere in the window or click the button with the name of the window in the task bar).
5. Select entry field and point the mouse pointer to the spot where you wish to enter the selected character.
6. To enter the character, press the key combination <Ctrl> + <V>.

> Note:
>
> *In the Windows environment, the value under "Regional and Language Options" must be set to* Slovenian.

6.1.2 Entering COBISS characters

The software enables entering and searching for data that contains letters from the extended Latin script (haceks, apostrophes, etc).

Procedure

1. In the editor or search window, activate the entry field and point the mouse pointer where you wish the character or string of characters to be placed.

[1] If you are using another Windows operating system, step 2 of the procedure differs slightly.

2. Press <Ctrl> + <S>.

   The **COBISS character set** window containing the COBISS characters will open.

   If the entry field in the search window or the editor already contains text, it will be automatically transferred to the "To copy" entry field.

3. When you click on any of the characters, the COBISS code will be displayed above the list under "COBISS value". Under "Unicode" you will see the Unicode code for the selected character.

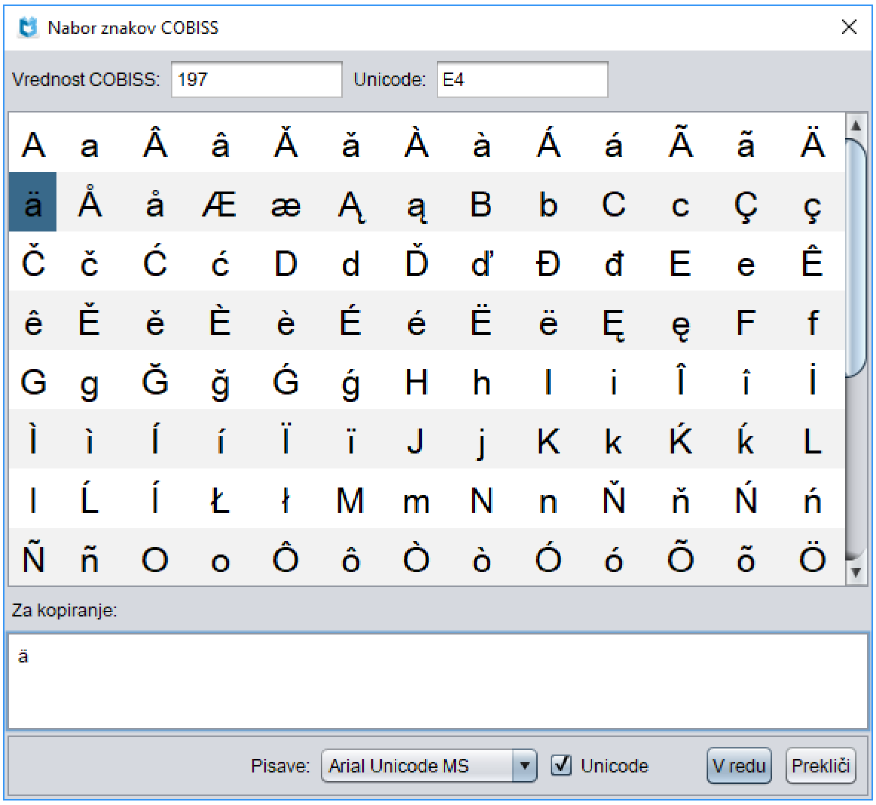


Figure 6.1-1: COBISS character set

4. Under "Fonts" select the type of font for the display of COBISS characters. The font is set to Arial Unicode MS by default. You can choose from all the fonts installed on your computer, but some of them do not include definitions of all the characters from the COBISS character set. Characters that are not defined in a specific font, are displayed as "?".

5. If you tick the "Unicode" checkbox, the list under "Fonts" is limited to Unicode standard fonts only.

6. From the list, select the character by double-clicking it. The selected characters will be transferred to the designated place in the "To copy" entry field. You can also type the characters directly in the "To copy" entry field if they are on your keyboard.

7. Click the **OK** button.

The contents of the "To copy" entry field will be entered to the entry field in the editor or the search window in the size and font you selected for displaying text in the user interface and not in the font you selected in the **COBISS character set** window.

If the font, selected for displaying text in the user interface, does not include the COBISS character you selected in the **COBISS character set** window, the selected character will be displayed as "□" in the entry field in the editor or the search window.

6.2 TYPES OF DATA

6.2.1 Dates

Dates are entered in the date format **dd.mm.yyyy** (DayDay MonthMonth YearYearYearYear).

The keys <D>, <W> and <M> enable automatic date entry.

By pressing the <D> key, the current date is transferred to the blank field. Each time you press the key again, the date entered is more recent by one day. By pressing the key combination <Shift> + <D>, the date of the previous day is transferred to the blank field. Each time you press this combination again, the date entered is more recent by one day.

By pressing the <W> key, the date transferred will be by one week more recent than the current date. Each time you press the key again, the date entered is more recent by one week. By pressing the key combination <Shift> + <W>, the date will be set back by one week from the current date. Each time you repeat this, the displayed date will be set back by one week.

By pressing the <M> key, the date transferred will be by one month more recent than the current date. Each time you press the key again, the date entered is more recent by one month. By pressing the key combination <Shift> + <M>, the date will be set back by one month from the current date. Each time you repeat this, the displayed date will be set back by one month.

To delete the entered date, press the space bar.

6.2.2 Phone and FAX numbers

Make sure to enter the dial code, followed by a space, when you enter a phone or fax number.

Examples:

03 5375 789
(02) 5375789

You can enter more phone or fax numbers in one field; however, they should be separated and entered as follows: space, slash "/", space. You can also enter the abbreviation "int." for internal phone numbers.

Examples:

03 5375 789 / 5449 651 / 041 654 876
(02) 5375789 int. 776

In case of phone or fax numbers abroad, enter the plus sign (+) and enter the country's international dial code followed by the direct number of the required person or institution (in domestic numbers, the plus sign (+) and the country's international dial code are added automatically when we confirm the entry or when we move to the next entry field).

Examples:

+31 152 571 796 – phone number in the Netherlands (Delft)
+43 1 534 10 – phone number in Austria (Vienna)

6.2.3 E-mail addresses

The data which you enter into the field for e-mail address must include a commercial at (@).

6.2.4 Decimal values

The fractions of a decimal number are separated by a comma.

6.2.5 Amounts of money

Amounts of money must be entered without separator periods (full-stops).

Examples:

The amount 1.540,00 must be entered as *1540,00*.
The amount 5.875,25 must be entered as *5875,25*.

6.2.6 Passwords

When logging in to the system, please note that passwords are case-sensitive, which means that the software will consider upper case and lower case letters to be different characters.

A BASIC INSTRUCTIONS ON USING THE WINDOWS ENVIRONMENT

Here are some basic instructions on how to work in the Windows environment.

A.1 USING A MOUSE

The mouse is a crucial part of the equipment you will need in order to work with windows. It has up to three buttons, but you will mostly use the left one if you are right-handed. If you are left-handed, you can reverse the button order of your mouse.

The term ***click*** means that you press and release the left mouse button. The sentence "Click the **Edit** button" means that you have to point the mouse pointer to the **Edit** button, and then press and release the left mouse button.

The term ***drag*** means that you point the mouse pointer to the selected item on the screen, press the left mouse button, drag the mouse to the next selected item and then release the button.

Example:

Drag over the text to select it.

A ***double-click*** is two clicks done very quickly without moving the mouse.

Example:

The quickest way to select a function is to double-click it.

A.2 MOVING WINDOWS AND ADJUSTING WINDOW SIZE

You can move windows across the screen and increase or decrease their size.

To ***move a window,*** point the mouse pointer to the window's title bar and drag it in the desired direction.

To ***change the window size*** of the browser, search window, viewer and their parts, use the ***borders***. Point the mouse pointer to one of the borders. When the mouse pointer changes into a double-arrow (↔, ↕), hold the left mouse button and drag it into the desired direction. You can move left, right, up and down.

> Tip:
>
> To change the length and width of a window at the same time, point the mouse pointer to one of the corners of the window and drag it into the desired direction.

The size of the browser window can also be changed using the ***title bar*** and the ***title bar buttons*** **Minimize**, **Maximize** and **Restore down**. You can extend the window across the entire desktop by clicking the button or double-clicking the title bar. By clicking the button or double-clicking the title bar, the original size of the window, which usually only takes up a part of the window, will be restored. By using the button, you can minimize the window size down to the size of a button in the task bar. To open the minimized window, click on the button with its name in the task bar.

A.3 SCROLL BARS

The work surface of the window can contain one or two scrollbars, which are situated on the right and bottom side of the window. Scrollbars are used to display the hidden contents of the window.

A.4 SELECTING MORE OBJECTS SIMULTANEOUSLY

You can select several objects simultaneously in two ways:

- if the objects are listed one after the other in the list:
  - click on the first object
  - press and hold the <Shift> key
  - click on the last object that you wish to include
  - release the <Shift> key
- if the objects are not listed one after the other in the list:
  - press and hold the <Ctrl> key
  - click every individual object
  - release the <Ctrl> key

The objects selected from the list will be highlighted.

A.5 MOVING AND COPYING TEXT

You can copy:

- text from the entry field in the editor or search window, which can be selected by dragging the mouse over it
- text in the browser, viewer or search window, which cannot be selected by dragging the mouse over it

You can copy text by using the clipboard. The clipboard is a temporary storage area where the selected text is stored. The clipboard holds the text until you copy or transfer another text to the clipboard.

Highlight the text you wish to copy in the entry field of the editor or search window by dragging the mouse over it and press the key combination <Ctrl> + <C>. The text will be copied to the clipboard but will also remain visible in the entry field. To ***move*** the highlighted text, press the key combination <Ctrl> + <X>. In this case, the text will be removed from the entry field and will be copied to the clipboard.

To copy the text to the clipboard, which cannot be highlighted by dragging the mouse over it, press the <Alt> key. Hold the key down and then double-click the selected text.

Select the position where you would like to insert the text from the clipboard (e.g. entry field in COBISS3 software, Word-file, etc.), press the key combination <Ctrl> + <V> and insert the text in the desired place. The copied text will remain on the clipboard, so the procedure can be repeated.

Note:

When using the programme "Reflection", you can insert text from the clipboard by clicking (Paste).

When using the programme "COBISS/Connect", you can insert text from the clipboard by clicking (Paste).

B LIST OF SHORTCUTS FOR SOME PROCEDURES AND METHODS

Table 1: List of shortcuts (hotkeys) for some procedures and methods

Shortcut (hot keys)	**Procedure, method**	**Window**	**Note**
<D>	enters current date or takes the entered date one day ahead	search window, editor	entry format *dd.mm.yyyy*
<W>	enters date which is one week ahead of the current or entered date	search window, editor	entry format *dd.mm.yyyy*
<M>	enters date which is one month ahead of the current or entered date	search window, editor	entry format *dd.mm.yyyy*
<Shift> + <D>	enters date which is one day behind the current or entered date	search window, editor	entry format *dd.mm.yyyy*
<Shift> + <W>	enters date which is one week behind the current or entered date	search window, editor	entry format *dd.mm.yyyy*
<Shift> + <M>	enters date which is one month behind the current or entered date	search window, editor	entry format *dd.mm.yyyy*
space bar	deletes the entered date	search window, editor	entry format *dd.mm.yyyy*
<Alt> + <M>	activates the menu bar and opens the **System** menu; use arrow keys <left> and <right> to open other menus, use keys <up> and <down> to select the method from the menu and then start it by pressing the space bar or the <Enter> key	browser	
<Alt> + <C>	activates the window containing modules and classes; to select modules and classes use the arrow keys <up>, <down>, <Home>, <End> , <PgUp>, <PgDn>	browser	
<Alt> + <W>	activates the workspace; use arrow keys <up>, <down>, <Home>, <End>, <PgUp>, <PgDn> to select records for further processing	browser	

<Alt> + <R>	activates the window containing related objects; use arrow keys <up>, <down>, <Home>, <End>, <PgUp>, <PgDn> to select records for further processing; double-click to copy the selected record to the workspace	browser	
<Ctrl> + <C>	copies highlighted text to clipboard	editor, search window	
<Alt> + double-click	copies highlighted text to clipboard	browser, search window, viewer	
<Ctrl> + <X>	transfers highlighted text to clipboard	editor, search window	
<Ctrl> + <V>	inserts text from clipboard to selected position	editor, search window	
<Ctrl> + <N>	creates new object; equal to the **Class / New object** method	browser	
<Ctrl> + <E>	edits object; equal to the **Object / Edit** method	browser	
<Ctrl> + <P>	prints report on default destination (printer); *the destination e-mail address will not be taken into account*; equal to the **Object / Print** method	browser	
<Ctrl> +<Enter>	searches for objects after entering the search request; equal to the **Find** button	search window	
<F3>	searches for records in the search window; equal to the **Class / Search** method	browser	
<F3>	opens the search window for the class of the record you are editing	editor	
<F4>	Searches for records by key; equal to the **Class / Search by key** method	browser	
<F5>	refreshes list of records in the workspace; equal to the **Workspace / Refresh** method	browser	
<F7>	removes all objects from the workspace	search window	
<PgUp>	previous page (page up)	print preview, code list, drop-down list	
<PgDn>	next page (page down)	print preview, code list, drop-down list	
<Home>	first page	print preview, code list, drop-down list	
<End>	last page	print preview, code list, drop-down list	
<Ctrl> + <S>	enters diacritical character	editor, search window	

<Tab>, then space bar	opens the window for displaying the code list	editor	
<right> arrow key	moves attribute of object from the list on the left side to the selected attributes or objects on the right side; equal to the **Add** button	window with two lists	
<left> arrow key	moves attribute of object from the list on the right side to the unselected attributes or objects on the left side; equal to the **Remove** button	window with two lists	
<Alt> + <up> arrow key	moves selected attribute in the search results display attributes (in the list on the right side) up one row; equal to the **Up** button	window for editing the display of search results	
<Alt> + <down> arrow key	moves selected attribute in the search results display attributes (in the list on the right side) down one row; equal to the **Down** button	window for editing the display of search results	

C LIST OF SOFTWARE POINTS FOR PERSONAL DATA PROCESSING (PDPA)

The *Library members' personal data processing by users* list includes data of all the users who recently (in the current or previous month) processed library members' personal data (their personal data, data on the material they borrowed from their home library or ordered through interlibrary loan, data on their requests for purchase of material, etc.).

The list shows who the users were, what they processed (software points) and how many times. The number of accesses to software points is the sum of all the rows (one row represents one record) in a special file (i.e. LOG-file or logger), where accesses to personal data are recorded for the selected software point. The number of these rows can be very big when using COBISS3 software, because several software points can be performed for one task.

Example:

Search all library members in the **Search – Member** search window. The data about the first ten members is displayed in the hit list. At the same time – regardless of the hit list format selected (the hit list format defines which data on the found members will be displayed in the search window) – the logger records that you accessed all personal data of these ten members (software point *C3_FRM_GET_OBJECTS*).

After selecting the data on a particular member from the hit list in the **Search – Member** search window, the data is transferred to the workspace of the browser. Some basic personal data about the member is displayed in the workspace, while most of it is displayed in the part of the browser window containing the list of attributes. For this reason, it is recorded in the logger that you accessed the personal data of the member (software point C3_FRM_GET_OBJECT) when you select the data about a particular member in the **Search – Member** search window and transfer it to the workspace.

If you have already loaded data about other members to the workspace before you searched and selected the particular member in the search window (see procedure previously described), at the same time as you select data about a particular member from the hit list in the **Search – Member** search window, due to possible changes in data about these members, their data is also refreshed in the workspace. Your access to personal data of all the members which are currently in the workspace is recorded in the logger (software point *FRM_DISPLAY_OBJECTS*).

In this case, 11 accesses to personal data of the members and one additional access to personal data for each member in the workspace are recorded in the logger when searching for a particular member in the **Search – Member** search window and after selecting the member (data transfer to the workspace).

In the COBISS2 software, access to members' personal data is recorded in the logger only for the data the user actually sees. The SELECT command is an exception, if there are more than 6 members in the search results. Although only the results for the first 6 members are displayed after the search is performed, your access to personal data of all the members is recorded in the logger, which can be displayed (up to 100 members).

When you examine the logger's contents (i.e. data about personal data processing), it fills up extremely quickly as everything you examined while checking is re-recorded in the same logger.

C.1 SOFTWARE POINTS FOR COBISS3 SOFTWARE MODULES

Table C.1-1: Software points for COBISS3 software modules

Software point label	Module name / module folder / event name	Description
C3_ACQ	Acquisition	Shows data about the member who requested the purchase of material
C3_CIR	Loan (*Circulation*)	Shows data about the member and material on loan
C3_EQU	Equipment loan (*Equipment*)	Shows data about the member and equipment on loan
C3_ILL	Interlibrary loan	Shows data about the customer – member and data about ordered material
C3_RPT_<*ID*> or C3_RPT_EXPORT	Reports and data exports	Prints reports and exports data that includes members' personal data (see table *C.1-2*)
C3_FRM_DISPLAY_OBJECTS	Refresh the list of objects in the workspace (*Refresh workspace*)	Adjusts the list of objects on the workspace to the current state of objects in the database
C3_FRM_GET_OBJECT	View object attributes (*View object*)	Shows attributes of the selected object in editor or viewer
C3_FRM_GET_OBJECTS	Searching for objects (Search window)	Shows one or more found objects in search window
C3_FRM_INVOKE	Invoke method through network (*Invoke method*)	You access this software point during special client-server calls; personal data, which is transferred to the client, is not necessarily visible to the user
C3_ FRM _PRINT_OBJECTS	View ID data (*Print object label*)	Personal data can be displayed in short object descriptions within the browser itself

The data in the table is sorted by COBISS3 software modules, then in alphabetical order of events.

Table C.1-2: Software points for COBISS3/Reports software module

Software point label	Report label[1]	Report name (description)
C3_RPT_DE_000085	ILL-STA-B01	Orders and order fulfilment – by customers/service type
C3_RPT_DE_000086	ILL-STA-B02	Orders and order fulfilment – by cust. with highest No. of ILL req./service type

[1] Some reports (still) do not have defined labels.

Software point label	Report label[1]	Report name (description)
C3_RPT_DE_000087	ILL-STA-B03	Speed of delivery – by customers/service type
C3_RPT_DE_000088	ILL-STA-B04	Orders and order fulfilment – by customers/material type
C3_RPT_DE_000101	ILL-STA-A07	Articles delivered by selected supplier – by customers
C3_RPT_DE_000102	ILL-STA-A08	Articles delivered by selected supplier – by journal titles
C3_RPT_DE_000109		Member's requests for purchase of material
C3_RPT_DE_000110		Member's requests for purchase of serials
C3_RPT_DE_000153		Notification of requestor about acquisition
C3_RPT_DE_000212		Membership card label
C3_RPT_DE_000234		Label with customer's address
C3_RPT_DE_000243	ILL-STA-C05	Electronically delivered documents – by customer/delivery method[2]
C3_RPT_DE_000285		ILL request rejection
C3_RPT_DE_000425	ILL-DM-A01	Material on loan – by customers/date of loan/date of return
C3_RPT_DE_000444		Member's requests for purchase of material (V4)
C3_RPT_DE_000445		Member's request for purchase of serials (V4)
C3_RPT_DE_000513		Routing list of serials
C3_RPT_DE_000514		Routing details for member
C3_RPT_DE_000516		Routing details for serials
C3_RPT_DE_000557		Members sorted by class/grade – before change
C3_RPT_DE_000558		Members sorted by class/grade – after change
C3_RPT_DE_000594		Label with customer's address (ZWE3483)
C3_RPT_DE_000595		Label with member's address (ZWE3483)
C3_RPT_DE_000642	LOAN-MM-06	Recipients of e-mail notification
C3_RPT_DE_000786	LOAN-MM-02	Material by status[3]
C3_RPT_DE_00095	LOAN-MM-03	Members and loan period date about to expire[4]
C3_RPT_DE_00096	LOAN-MM-04	Notification about a loan period expiry date (mail)[5]
C3_RPT_DE_000997	LOAN-MM-05	Notification about a loan period expiry date (e-mail)[6]
C3_RPT_DE_001004	LOAN-ON-02	List of recipients of overdue notices

[2] Up until V6.8-00(03) designation C3_RPT_DE_000089.
[3] Up until V5.3-04 designation C3_RPT_DE_000638.
[4] Up until V5.3-04 designation C3_RPT_DE_000645.
[5] Up until V5.3-04 designation C3_RPT_DE_000640.
[6] Up until V5.3-04 designation C3_RPT_DE_000641.

Software point label	Report label[1]	Report name (description)
C3_RPT_DE_001021	LOAN-Mt-01	Material by transactions[7]
C3_RPT_DE_001042	LOAN-MM-01	Members with recorded material[8]
C3_RPT_DE_001087		Moneta payment confirmation
C3_RPT_DE_001101		Inactive members (batch deletion)
C3_RPT_DE_001103		Inactive members with debts (batch deletion)
C3_RPT_DE_001128		Label with COBISS3 member's address (ZWE3483) – COBISS3
C3_RPT_DE_001141		Order (internal order)
C3_RPT_DE_001312		Returned material [9]
C3_RPT_DE_001314		Reservation cancellations (daily) (reservation processing)[10]
C3_RPT_DE_001315		List of deleted reservations[11]
C3_RPT_DE_001316		Notification about reservation via COBISS+ (e-mail)[12]
C3_RPT_DE_001318		Notification about reservation cancellation via COBISS+ (e-mail)[13]
C3_RPT_DE_001320		Reservation cancellations (Reservation processing)[14]
C3_RPT_DE_001328	LOAN-ON-01	Overdue notices[15]
C3_RPT_DE_001467		E-notifications[16]
C3_RPT_DE_001481		Lending form (e-mail)
C3_RPT_DE_001504		Delivery note (for Accounting)
C3_RPT_DE_001695		Lending form (today's or selected material)
C3_RPT_DE_001696		Lending form[17]
C3_RPT_DE_001697		Lending form (all departments)
C3_RPT_DE_001758	LOAN-EXP -01	List of uncollected debts
C3_RPT_DE_001819	ILL-DM-B01	Material on loan – by customers/date of loan/date of return[18]
C3_RPT_DE_001854		Listek s podatki o rezervaciji[19]
C3_RPT_DE_001855		Novoprispele rezervacije (obdelava rezervacij)[20]
C3_RPT_DE_001856		Dnevni seznam rezervacij (obdelava rezervacij)[21]

[7] Up until V5.3-04 designation C3_RPT_DE_000633.
[8] Up until V5.3-04 designation C3_RPT_DE_000644.
[9] Up until V6.4-00 designation C3_RPT_DE_000636.
[10] Up until V6.4-00 designation C3_RPT_DE_000829.
[11] Up until V6.4-00 designation C3_RPT_DE_000908.
[12] Up until V6.4-00 designation C3_RPT_DE_000937.
[13] Up until V6.4-00 designation C3_RPT_DE_000941.
[14] Up until V6.4-00 designation C3_RPT_DE_000822.
[15] Up until V6.4-00 designation C3_RPT_DE_001008.
[16] Up until V6.4-00 designation C3_RPT_DE_001182.
[17] Up until V5.3-04 designation C3_RPT_DE_000635, up until V6.4-00 designation C3_RPT_DE_001124.
[18] Up until V6.4-00 designation C3_RPT_DE_000424.
[19] Up until V5.3-04 designation C3_RPT_DE_000794, up until V6.4-00 C3_RPT_DE_001215 and up until V6.8-00(03) C3_RPT_DE_001308.
[20] Up until V5.3-04 designation C3_RPT_DE_000821, up until V6.4-00 C3_RPT_DE_001134 and up until V6.8-00(03) C3_RPT_DE_001309.

Software point label	Report label[1]	Report name (description)
C3_RPT_DE_001918	LOAN-TR-05	Members with highest number of loans
C3_RPT_DE_001931		Copy
C3_RPT_DE_001932		Invoice[22]
C3_RPT_DE_001933		Cancellation of invoice[23]
C3_RPT_DE_001937		Credit note
C3_RPT_DE_001972		Registration form
C3_RPT_DE_002057	LOAN-R-05	Reservations of available material – by status
C3_RPT_DE_002115	LOAN-R-06	Cancellations of available material reservations from My library (COBISS+) – by status
C3_RPT_DE_002154		Card for membership card
C3_RPT_DE_002184		Lending form for newly received reservations[24]
C3_RPT_DE_002280	LOAN-TR-01	Transactions for member - membership card No.[25]
C3_RPT_DE_002288	LOAN-TR-02	Transactions for member - ID No.[26]
C3_RPT_DE_002289	LOAN-TR-03	Transactions involving material[27]
C3_RPT_DE_002312	LOAN-CRO-04	Overview of payments (invoices, credit notes, cancellations)
C3_RPT_DE_002318		Confirmation on online registration (e-mail)
C3_RPT_DE_002327	LOAN-Mb-09	Active members
C3_RPT_DE_002332	LOAN-TR-04	List of cash register transactions[28]
C3_RPT_DE_002506		Lending form (equipment)
C3_RPT_DE_002531	LOAN-R-05	Reservations of available material – by status (reservation type included)
C3_RPT_DE_002561	LOAN-Mt-02	List of most requested material
C3_RPT_DE_002576	LOAN-EXP-01	Material by transaction
C3_RPT_DE_002577	LOAN-EXP-02	Members with entered material
C3_RPT_DE_002579		Lending form for newly received reservations (NUK_A5)
C3_RPT_DE_002587	LOAN-Mb-08	List of members with debts[29]
C3_RPT_DE_002589	LOAN-Mb-10	Notification about outstanding debts
C3_RPT_DE_002661	LOAN-Mb-02	Members by date of last visit[30]
C3_RPT_DE_002663	LOAN-Mb-06	Members by date of last visit/by departments[31]

[21] Up until V5.3-04 designation C3_RPT_DE_000827, up until V6.4-00 C3_RPT_DE_001135 and up until V6.8-00(03) C3_RPT_DE_001319.
[22] Up until V6.4-00 designation C3_RPT_DE_000696, up until V6.8-00(03) designation C3_RPT_DE_001745.
[23] Up until V5.3-04 designation C3_RPT_DE_001014, up until V6.8-00(03) designation C3_RPT_DE_001180.
[24] Up until V5.3-04 designation C3_RPT_DE_000798, up until V6.4-00 designation C3_RPT_DE_001137, up until V6.8-00(03) designation C3_RPT_DE_001317 and up until V6.14-00 designation C3_RPT_DE_001857.
[25] Up until V6.12-00 designation C3_RPT_DE_000646.
[26] Up until V6.12-00 designation C3_RPT_DE_000647.
[27] Up until V6.12-00 designation C3_RPT_DE_000648.
[28] Up until V6.8-00(03) designation C3_RPT_DE_001652, up until V6.12-00 designation C3_RPT_DE_002099.
[29] Up until V6.12-00 designation C3_RPT_DE_001759, up until V6.14 designation C3_RPT_DE_002287.
[30] Up until V6.12-00 designation C3_RPT_DE_000628, up until V6.15-00 designation C3_RPT_DE_002301.

Software point label	Report label[1]	Report name (description)
C3_RPT_DE_002664	LOAN-Mb-01	Selected members[32]
C3_RPT_DE_002665	LOAN-Mb-03	List of members with notes[33]
C3_RPT_DE_002666	LOAN-Mb-04	Deleted members[34]
C3_RPT_DE_002667	LOAN-Mb-05	Members - changed details[35]
C3_RPT_DE_002678	LOAN-MM-07	List of reserved material[36]
C3_RPT_DE_002697	LOAN-Mb-11	List of members' debts
C3_RPT_DE_002753	LOAN-EXP-06	List of members' debts
C3_RPT_DE_002901		List of deleted reservations
C3_RPT_DE_003116	LOAN-MM-09	Members and loan period date about to expire (without material data)
C3_RPT_DOBAVNICA		Delivery note
C3_RPT_NALEPKA_DOBAVNICA		Label with customer's address
C3_RPT_NALEPKA_GLBPATRON		Label with member's address – COBISS3
C3_RPT_NALEPKA_PATRON		Label with member's address
C3_RPT_NAROČILO_MI		Order
C3_RPT_OBVESTILO_MI		Notification
C3_RPT_VRNJENO_GRADIVO_MI		Confirmation on material return
C3_RPT_ZAHTEVEK_MI		ILL request

The software points in the table are sorted in alphabetical order of labels.

[31] Up until V6.12-00 designation C3_RPT_DE_000632, up until V6.15-00 designation C3_RPT_DE_002276.
[32] Up until V6.15-00 designation C3_RPT_DE_000627.
[33] Up until V6.15-00 designation C3_RPT_DE_000629.
[34] Up until V5.3-04 designation C3_RPT_DE_000630, up until V6.15-00 designation C3_RPT_DE_001213.
[35] Up until V6.15-00 designation C3_RPT_DE_000631.
[36] Up until V6.14-00 designation C3_RPT_DE_002401, up until V6.15-00 designation C3_RPT_DE_002562.

C.2 SOFTWARE POINTS FOR COBISS2 SOFTWARE MODULES

Table C.2-1: Software points for the COBISS2/Loan software module

Software point label	Command name	Description
C2_CIR_COPY	COPY	Insight into data about members imported from other system
C2_CIR_CR	CHECK/RESERVATION	Creation of report *CIR100 – list of members with newly received reservations*; a new record is added to the logger for each newly received reservation
C2_CIR_DEB	ACCOUNT	Insight into data about outstanding debts for the member
C2_CIR_DEPOTH	?DEPARTMENT	Insight into loan records in other departments
C2_CIR_DIN	DELETE/INACTIVE and DELETE/INACTIVE_SELECT	Creation of reports *CIR012* and *CIR014* with a list of members who were deleted as inactive and a list of members who were not deleted as they have material, debts or a note recorded; a new entry is added to the logger for each member
C2_CIR_EDIT	EDIT	Access to all member details entered
C2_CIR_ER	ERASE/RESERVATION	Creation of report *CIR100a – list of members with expired and deleted reservations*; a new entry is added to the logger for each deleted reservation
C2_CIR_ETI	ETI	Prints labels with member details
C2_CIR_LOOK	LOOK	Displays loan status of material (if material is on loan to member, member details are also displayed); if there is a list of reservations, a new entry is added to the logger for each member from the list
C2_CIR_MEMB	MEMBER	Entry into member's loan environment – a list of all material recorded for member (on loan, reserved, etc.) is displayed
C2_CIR_MEMB_C	MEMBER	Outside loan – a new item of material is added to the list, event is recorded in the logger
C2_CIR_MEMB_O	MEMBER	Reservation of available material – a new item of material is added to the list, event is recorded in the logger

Software point label	Command name	Description
C2_CIR_MEMB_R	MEMBER	Reservation of material on loan – a new item of material is added to the list, event is recorded in the logger
C2_CIR_MEMB_S	MEMBER	Reading room loan – a new item of material is added to the list, event is recorded in the logger
C2_CIR_MINFO	MEMBINFO	Insight into data about member's discipline – only the indicator is displayed
C2_CIR_NEW	NEW	New member (entry of all member details)
C2_CIR_NOT	NOTIFY	Insight into data for e-notifications (except password)
C2_CIR_NOTM	NOTE/MEMBER	Insight into note about member
C2_CIR_PERIOD	PERIOD	Defines a new date to return the material
C2_CIR_PROL	PROLONG and PROLONG/ALL	Loan renewal
C2_CIR_PRT	PRT and SYSPRT	Displays results of the previous search for member details by mentioned commands which can be displayed on screen or sent to printer
C2_CIR_PRTALL	PRTALL	Prints lending form: list of recorded material and list of outstanding debts (for each item separately)
C2_CIR_PRTDEBT	PRTDEBT	Prints lending form for each item of material
C2_CIR_PRTMEMB	PRTMEMB	Prints a list of recorded material for the member (for each item separately)
C2_CIR_RET	RETURN	Returns a copy without previous member selection (member details are displayed)
C2_CIR_RETDATE	REDATE and RETDATE/ALL	Defines a new date to return the material
C2_CIR_SEL	SELECT, SEARCH and DISPLAY	Displays search results of members' details using commands SELECT, SEARCH and DISPLAY; if more than 6 members are to be displayed, the list is shown on the next screen
C2_CIR_VISIT	VISIT and VISIT_INTERNET	Records visits by a member

Software points in the table are sorted in alphabetical order of labels.

Table C.2-2: Software points for the segment COBISS2/Reports

Software point label	Report label	Report name
C2_RPT_CIR001	CIR001	List of members
C2_RPT_CIR002	CIR002	List of members with material on loan

Software point label	Report label	Report name
C2_RPT_CIR003	CIR003	List of members with maturity of membership fee
C2_RPT_CIR004	CIR004	List of members with debt
C2_RPT_CIR005	CIR005	List of members with notes
C2_RPT_CIR006	CIR006	Active members in the selected period
C2_RPT_CIR007	CIR007	Inactive members in the selected period
C2_RPT_CIR008	CIR008	List of members with routing details; a new entry is added to the logger for each reservation
C2_RPT_CIR009	CIR010	List of members for e-notification
C2_RPT_CIR011	CIR011	Control list before executing a command DELETE/INACTIVE; a new entry is added to the logger for each member; information about material, debt or note is also displayed in the list of members that were not deleted
C2_RPT_CIR013	CIR013	Control list before executing a command DELETE/INACTIVE_SEL; a new entry is added to the logger for each member; information about material, debt or note is also displayed in the list of members which were not deleted
C2_RPT_CIR101	CIR101	List of material by status; a new entry is added to the logger for each item of material
C2_RPT_CIR102	CIR102	List of material by transactions; a new entry is added to the logger for each item of material
C2_RPT_CIR106	CIR106	List of routing details; a new entry is added to the logger for each member
C2_RPT_CIR108	CIR108	List of reserved material; a new entry is added to the logger for each member
C2_RPT_CIR201	CIR201	Overdue notices; a new entry is added to the logger for each item of material with overdue notice
C2_RPT_CIR202	CIR202	Suit; a new entry is added to the logger for each item of material with a suit
C2_RPT_CIR203	CIR203	List of overdue notices
C2_RPT_CIR204	CIR204	List of suits
C2_RPT_CIR205	CIR205	List of suits with data on the material; a new entry is added to the logger for each item of material with a suit
C2_RPT_CIR206	CIR206	List of uncollected debts; a new entry is added to the logger for each item of material with a suit

Software point label	Report label	Report name
C2_RPT_CIR207	CIR207	List of members with overdue notices; a new entry is added to the logger for each item of material with overdue notice
C2_RPT_CIR208	CIR208	Uncollected debts; a new entry is added to the logger for each item of material with a suit
C2_RPT_CIR209	CIR209	Material with expired loan period; a new entry is added to the logger for each item of material with overdue loan period
C2_RPT_CIR211	CIR211	List of members with expired loan period; a new entry is added to the logger for each item of material with expired loan period
C2_RPT_CIR307	CIR307	Sales ledger; a new entry is added to the logger for each item of material with entered debts
C2_RPT_CIR501	CIR501	Transactions for member; a new entry is added to the logger for each transaction
C2_RPT_CIR502	CIR502	Transactions involving material; a new entry is added to the logger for each transaction
C2_RPT_CIR504	CIR504	List of entered material; a new entry is added to the logger for each item of material
C2_RPT_CIR506	CIR506	List of members with membership card number, surname and name
C2_RPT_CIR901	CIR901	Notifications for readers
C2_RPT_CIR902	CIR902	Notifications for readers (material)
C2_RPT_CIR904	CIR904	Notifications about outstanding debts
C2_RPT_CIR905	CIR905	Notification of inactive members

Software points in the table are sorted in alphabetical order of labels.

C.3 DATA VIEWING FORMAT IN LISTS OF PERSONAL DATA PROCESSING

Data viewing format in the *Library members' personal data processing by selected user* list and in the *Processing of selected library member's personal data* list is as follows:

<Date> <Database> <Username> <Revision> <Environment> <Member> <Member data> <Data type> <Add. data>.

The data is separated by a tab. The first eight pieces of data are required. The data is non-repeatable (e.g. for a member who has several items of material on loan, there are as many records in the file as there are items of material on loan to the member).

Data	**Description**	**Example**
Date	Date and time of access; form: DD.MM.YYYY HH:MM:SS	28.09.2010 10:36:57
Database	library acronym	IZUM
Username	username of the user	bojana
Revision	indicator which indicates the type of insight into personal data about the members: *0* – the user accessed personal data through application *1* – the authorised person of the library examined the logger	1
Environment	Software point code where the insight took place (in COBISS2 or COBISS3 software)	see tables *C.1-1, C.1-2, C.2-1* and *C.2-2.*
Member	member ID: M + membership card number; M – member designation	M1266554
Member data	surname and name, date of birth	LAH DENIS, 12.11.1963
Data type	member's data examined by the user: NA – only member's personal data	
	M… – data about material on loan (M + COBISS.SI-ID of material; (M – material designation); if COBISS.SI-ID doesn't exist, values under "ISBN", "ISSN, "Title", "Source – title" or "Standard" are displayed) – text length is limited to 50 characters	M3023
	OVR – details about overdue notices LST – details about lost material NOT – notes about member DEP – member's outstanding debts	
Add. data	details about member's examined data; empty field means that the user examined all possible data in the software point	

C.4 REPORT ON THE EXAMINATION OF PERSONAL DATA PROCESSING

Below is a model of a report on the examination of personal data processing, which can be printed out (see chapter *5.18.5*, step 3).

<logo of the institution>

<dd.mm.yyyy>

Report on the examination of personal data processing

Institution: *<institution/library name>*

Examination date: *<date of personal data examination performed by users>*

Examined by: *<surname and name of the authorised person who performed the personal data examination>*

Examination month: *<month for which the examination was performed>*

User: *<surname and name of the user whose processing was examined>* Username: *<username of the user whose processing was examined>*

Established situation (in accordance with authorisations and Personal Data Protection Act; irregularities if any):

<description>

Interview with the user and findings:

<description>

Proposed measures:

<description>

Examiner’s signature: *<signature of the authorised person who examined personal data processing>*

GLOSSARY

aggregated object (slv. *vsebovani objekt*)

An object within a certain class, which does not exist on its own, but is aggregated in another object (see also *object*, *class*).

attribute (slv. *atribut*)

Class entity. Each attribute has a name (see also *object, class*).

Example:
The partner class includes the following attributes: name, second name, partner's address, etc.

basic report (slv. *osnovni izpis*)

A list of an object's attributes and their values.

BCC (**blind carbon copy**) (slv. *Skp*)

The recipient(s) who receive a copy of an e-mail but are hidden to all other recipients (see also *group of addresses*).

borders (slv. *rob okna*)

Define the edges of a window. The size of the browser, search window or viewer can be changed using the borders, while the size of the editor cannot be changed.

browser (slv. *brskalnik*)

The main window of the user interface. Enables the selection of modules and classes, viewing of and navigating between objects, performing methods for classes and objects (compare with *search window*, *viewer*, *editor*).

CC (**carbon copy**) (slv. *Kp*)

The recipient(s) who receive a copy of an e-mail and are visible to all other recipients (see also *group of addresses*).

checkbox (slv. *potrditveno polje*)

The ☐ field which gets selected or deselected when you click on it. If there is a tick inside the box (☑), the option is selected, if the box is empty, the option is not selected. Checkboxes represent options which are not interdependent, so you can select more than one option at the same time (compare with *radio button*).

class (slv. *razred*)

A group of objects. A class is defined by all the data (i.e. attributes), which is common to all objects of that class and define its content. Each class has a name (see also *attribute*, *object*).

Example:
All data about the Institute of Education Science in Ljubljana (partner's name, ID, address etc.) is defined in the *Partner* class.

client (slv. *odjemalec*)

A computer where the user interface of COBISS3 software is installed (see also *server*).

clipboard (slv. *odložišče*)

A place where copied text is temporarily stored.

configuration file (slv. *inicializacijska datoteka*)

The file containing all parameters necessary to run the COBISS3 software.

context menu (slv. *priročni meni*)

Includes methods. To open the context menu, select an individual element (e.g. object, class, etc.) and click the right mouse button. The content varies depending on the class, object, shortcut or query selected (compare with *menu*).

delete (slv. *brisanje*)

To eliminate information from the database. The deleted data is no longer included in the database (see also *remove*).

Example:
You can delete an order from the order database.

destination (slv. *destinacija*)

The address to which reports are sent to, i.e. an e-mail address or a printer. One set of e-mail addresses or one printer name represents one destination (see also *set of e-mail addresses*).

destination change (slv. *spreminjanje destinacij*)

To add, edit or remove destinations (see also *destination*).

destination in report definition (slv. *destinacija v definiciji izpisa*)

The destination is defined when preparing a report definition for an actual report, such as an order. It can only be defined by the user who holds the privilege for creating report definitions (see also *report definition*, *destination*).

drop-down list (slv. *spustni seznam*)

A list of options for selecting coded data. The field containing the drop-down list is marked with the arrow "▼". After clicking on the field or the arrow, a list will appear. To transfer the appropriate value to the field, click on it. The drop-down list will close automatically.

edit (slv. *spreminjanje*)

To change the object properties (in certain cases, it may include deleting).

editor (slv. *urejevalnik*)

One of the user interface components which enables entering and changing attribute values of the selected objects and aggregated objects, defining object relationships, viewing aggregated and related objects (compare with *browser*, *search window*, *viewer*).

enter (slv. *vnos*)

To add and edit new object properties.

entry field (slv. *vnosno polje*)

The field for entering values. Click on the field to activate it.

file (slv. *datoteka*)

A sorted collection of data.

folder (slv. *mapa*)

A list of classes and objects. Synonymous to *directory*.

form (slv. *obrazec*)

The document, which is printed out or sent to the recipient's e-mail address (compare with *report*).

group of addresses (slv. *skupina naslovov*)

A group, in which one or more e-mail addresses can be defined. There are three groups of addresses: TO – group of main recipients, CC – group of recipients receiving a copy, and BCC – group of recipients receiving a hidden copy (the recipients from groups TO and CC as well as all other recipients from BCC cannot see these recipients). The recipients from all the groups represent one set of e-mail addresses (see also *BCC, CC, set of e-mail addresses, TO*).

hit list format (slv. *prikaz rezultatov iskanja*)

Defines the list and order of attributes on the hit list in the search window (see also *attribute*, *object*).

home library (slv. *domača knjižnica*)

The library which employs all users and the local applications administrator (see also *user, local applications administrator*).

local applications administrator (slv. *skrbnik lokalnih aplikacij*)

A qualified employee of the home library, who is in charge of defining usernames and privileges to username groups to work with COBISS3 software (see also *username*).

logical destination (slv. *logična destinacija*)

Every system report has a logical destination which defines where the report will be sent to. The logical destination for each library is defined when the COBISS3 software is installed.

menu (slv. *meni*)

One of the menus in the menu bar, e.g. System, Class, Object, etc. Each menu includes several methods, which are used to perform certain procedures (see also *menu bar*, compare with *context menu*).

menu bar (slv. *menijska vrstica*)

The bar below the title bar, which consists of several menus. The menu bar content does not change (see also *menu*, compare with *title bar, tool bar*).

method (slv. *metoda*)

A completed set of actions performed on an object or class, which enables business transactions (see also *object*, *class*).

module (slv. *segment*)

A part of COBISS3 software, such as COBISS3/Interlibrary Loan. Synonymous to *application.*

object (slv. *objekt*)

An entity of a class. A set of data on people (partners, customers), events (ordering, claiming, informing), or things (orders, delivery notes, receipts). (see also *attribute*, *class*).

Example:
All data about the Institute of Educational Science in Ljubljana, which is stored in the object's database, represents one single object in the *Partner* class.

object key (slv. *ključ objekta*)

An attribute, which uniformly identifies an object, e.g. order number, partner ID (see also *attribute*, *object*).

object property (slv. *lastnost objekta*)

Defines the object. Object properties are: attributes, object related objects, aggregated objects (see also *object*).

object relationships (slv. *povezave objekta*)

A list of aggregated and related objects of the selected object.

preview (slv. *predogled*)

Shows on the screen what the document will look like and allows for checking before the document is sent to the destination.

query (slv. *poizvedba*)

A set of search parameters for the search of object(s) in the selected class.

radio button (slv. *izbirni gumb*)

The ○ field, which gets selected or deselected when you click on it. If there is a dot inside the field (⦿), the option is selected, if the field is empty, the option is not selected. Radio buttons represent options which exclude each other, so you can only select one option at a time (compare with *checkbox*).

remove (slv. *odstranjevanje*)

To remove data from a certain place. The removed data is still included in the database (see also *delete*).

Example:
You can remove an item from the document.

report (slv. *izpis*)

Consists of one or more forms (compare with *form*).

report definition (slv. *definicija izpisa*)

Defines the content, form and destination of a report. It can only be accessed by the user who holds the privilege for creating report definitions (see also *destination, destination in report definition*).

report queue (slv. *izpisna vrsta*)

A list of selected objects from the same class, for which a report, selectable from the list of report definitions, can be sent to the destinations (printer or e-mail).

report submission (slv. *izstavitev izpisa*)

The method which marks that a report (document) was sent to its recipient.

scroll bar (slv. *drsni trak, drsnik*)

If the workspace of the window does not display the whole content of the page, a scroll bar will appear on the right or bottom edge of the window, which will enable the user to see the hidden part of the content.

search window (slv. *iskalnik*)

One of the user interface components which enables searching for objects in a selected class (compare with *browser*, *viewer*, *editor*).

server (slv. *strežnik*)

A computer where the COBISS3 software and additional software is installed (e.g. Oracle database, Java) (see also *client*).

set of e-mail addresses (slv. *skupek e-naslovov*)

The e-mail addresses from the groups of addresses. One set of e-mail addresses must include at least one e-mail address from the TO group of e-mail addresses. E-mail addresses from the groups CC or BCC are optional. One set of e-mail addresses represents one line in the list of destinations (see also *destination*, *group of addresses*).

shortcut (slv. *bližnjica*)

The path to an object, which is accessible without prior searching and can be added to the workspace.

title bar (slv. *naslovna vrstica*)

The bar on the top of the browser, editor, search window or viewer window.

TO (slv. *Za*)

The main recipient(s) of an e-mail.

tooltip (slv. *zaslonski namig*)

The information (name of a method or attribute or explanation) about the elements in the browser, editor, search window or viewer that appears when the mouse pointer is positioned over the method in the menu, an icon, attribute name, aggregated or related object.

tool bar (slv. *orodna vrstica*)

The bar below the menu bar which consists of several icons for the most frequently used methods. As a rule, the tool bar content cannot be changed (compare with *menu bar*).

user (slv. *uporabnik sistema*)

A qualified employee of the home library using COBISS3 software.

username (slv. *uporabniško ime*)

The code, which enables the user to log in to COBISS3 software. The code may contain letters and numbers (digits).

user destination (slv. *priročni meni*)

If the report definition does not include a predefined destination, the user destination will be taken into account. It can be defined in the menu bar in the **Settings** menu for every user separately (see also *destination*, *menu bar*, *username*).

viewer (slv. *pregledovalnik*)

One of the user interface components which enables viewing attributes of the selected object, its aggregated objects as well as its related objects (compare with *browser*, *search window*, *editor*).

workspace (slv. *delovno področje*)

A part of the browser window, where objects, created or selected (after searching, through related objects and from shortcuts) for further processing, are being added (see also *browser*).

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