

COBISS[®]

Co-operative Online Bibliographic System & Services

COBISS3 Basic Guidelines

V6.1-02

User Manual

Institute of Information Science, Maribor, Slovenia

IZUM[®]

© IZUM, 2014

COBISS, COMARC, COBIB, COLIB, IZUM are registered trademarks owned by public institution IZUM.

Oracle and Java are registered trademarks owned by Oracle Corp. or its affiliated companies.

Other trademarks used are owned by their owners.

The manual includes all updates from the first printed version of the manual published in February 1999 onwards. Its content corresponds with the COBISS3, V6.1-02 software, and is also valid for all future software versions until it is either withdrawn, or another electronic version is published.

© IZUM, content last updated: December 2014, Eng. Transl.: January 2015

CONTENTS

PREFACE	PREFACE-1
ABOUT THE MANUAL	ABOUT THE MANUAL-1
1 INTRODUCTION	1-1
2 COBISS3 INSTALLATION	2-1
2.1 System requirements	2.1-1
2.2 User interface installation	2.2-1
2.3 Login and logoff	2.3-1
2.3.1 Start using COBISS3 software	2.3-1
2.3.2 Finish working with COBISS3 software	2.3-2
3 USER INTERFACE	3-1
3.1 Browser.....	3.1-1
3.1.1 Title bar	3.1-3
3.1.2 Menu bar.....	3.1-3
3.1.2.1 Menu properties	3.1-4
3.1.2.2 Selecting methods within menus.....	3.1-4
3.1.2.3 Context menus.....	3.1-5
3.1.2.4 Help.....	3.1-5
3.1.3 Toolbar	3.1-6
3.1.4 Modules and classes	3.1-6
3.1.4.1 Selecting a class	3.1-7
3.1.4.2 Opening and closing folders.....	3.1-7
3.1.5 Workspace	3.1-8
3.1.5.1 Loading objects	3.1-8
3.1.5.2 Selecting objects.....	3.1-9
3.1.5.3 Removing all objects.....	3.1-9
3.1.5.4 Removing selected objects.....	3.1-10
3.1.5.5 Refreshing a list of objects	3.1-10
3.1.6 Class attributes.....	3.1-10
3.1.7 Related objects.....	3.1-10
3.1.7.1 Object selection.....	3.1-11
3.1.8 Queries.....	3.1-11
3.1.8.1 How to use a query.....	3.1-11
3.1.8.2 Renaming a query	3.1-12
3.1.8.3 Deleting a query	3.1-12
3.1.9 Shortcuts.....	3.1-12
3.1.9.1 Adding an object to shortcuts.....	3.1-12
3.1.9.2 Using a shortcut.....	3.1-13
3.1.9.3 Renaming a shortcut.....	3.1-13
3.1.9.4 Deleting a shortcut	3.1-13
3.1.9.5 Viewing object properties in the shortcuts.....	3.1-13
3.2 Search window.....	3.2-1

3.3	Editor.....	3.3-1
3.4	Viewer.....	3.4-1
4	BASIC PROCEDURES	4-1
4.1	Creating an object	4.1-1
4.2	Entering and editing object properties	4.2-1
4.2.1	Attributes	4.2-2
4.2.1.1	Entering the value into entry fields	4.2-2
4.2.1.2	Entering the attribute value into the windows for entering values	4.2-2
4.2.1.3	Entering the attribute value into the windows for entering values of repeatable attributes	4.2-3
4.2.1.4	Selecting the value from drop-down lists	4.2-4
4.2.1.5	Selecting the value from code lists.....	4.2-5
4.2.1.5.1	Finding values in the code list	4.2-5
4.2.1.6	Selecting the value with checkboxes.....	4.2-6
4.2.1.7	Selecting the value with radio buttons.....	4.2-6
4.2.2	Object relationships	4.2-7
4.2.2.1	Relationships with one object.....	4.2-7
4.2.2.1.1	Defining a relationship.....	4.2-7
4.2.2.1.2	Defining a relationship using the icon for entering or deleting a relationship.....	4.2-8
4.2.2.1.3	Deleting a relationship using the icon for entering or deleting a relationship.....	4.2-8
4.2.2.1.4	Viewing a related object	4.2-8
4.2.2.2	Relationships with more objects.....	4.2-8
4.2.2.2.1	Defining a relationship.....	4.2-8
4.2.2.2.2	Removing a relationship	4.2-9
4.2.2.2.3	Viewing a related object	4.2-9
4.2.3	Aggregated objects	4.2-9
4.2.3.1	Creating an aggregated object	4.2-10
4.2.3.1.1	Creating an aggregated object and editing its properties	4.2-10
4.2.3.1.2	Deleting an aggregated object.....	4.2-11
4.2.3.1.3	Viewing an aggregated object.....	4.2-11
4.2.3.2	Creating more aggregated objects	4.2-11
4.2.3.2.1	Creating an aggregated object.....	4.2-11
4.2.3.2.2	Editing properties of an aggregated object	4.2-12
4.2.3.2.3	Deleting an aggregated object.....	4.2-12
4.2.3.2.4	Viewing an aggregated object.....	4.2-12
4.2.4	Saving an object.....	4.2-12
4.3	Searching.....	4.3-1
4.3.1	Searching in the search window	4.3-1
4.3.1.1	Selecting search fields	4.3-4
4.3.1.2	Entering search parameters	4.3-5
4.3.1.2.1	Entering search parameters using the code list	4.3-6
4.3.1.2.2	Deleting search parameters, entered using the code list	4.3-7
4.3.1.2.3	Expand	4.3-7
4.3.1.3	Saving queries	4.3-8
4.3.1.4	Selecting the hit list format	4.3-8
4.3.2	Searching by key.....	4.3-8
4.3.3	Searching through queries	4.3-9
4.3.4	Editing hit list formats	4.3-9

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).