COBISS®

Co-operative Online Bibliographic System & Services

COBISS3 Basic Guidelines

V6.5-00

User Manual

Institute of Information Science, Maribor, Slovenia

IZUM®

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The manual includes all updates from the first printed version of the manual published in February 1999 onwards. Its content corresponds with the COBISS3, V6.5-00 software, and is also valid for all future software versions until it is either withdrawn, or another electronic version is published.

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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** – searching records in the shared bibliographic database
  - **< local database acronym >** – searching bibliographic records in the local database
- button for selecting the search mode (the button is only available in the search window within the **Bibliographic record**, **Authority record (CONOR)**, **CORES**, **Field 996/997**, **Field 998** and **COBIB.SI** classes):
  - **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 (the functionality in the search window within the **Authority record (CONOR)** and **CORES** classes is not available)[1]
- **Set limit** button to determine the maximum number of search terms (the button is only available in the search window of **Authority record (CONOR)** and **CORES** classes)[2]

[1]The functionality for the **Bibliographic record**, **Field 996/997**, **Field 998** and **COBIB.SI** classes is only enabled by the SOLR search platform.
[2]The functionality is also available for **Bibliographic record**, **Field 996/997**, **Field 998** and **COBIB.SI** classes, if the search is not enabled by the SOLR search platform.

- 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 (available only in the advanced search mode; functionality not available in the search window of **Authority record (CONOR)** and **CORES** classes)[3]
- 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 in the search window of the **Bibliographic record**, **Field 996/997**, **Field 998** and **COBIB.SI** classes) and "Scanning" (only available in the search window of the **Bibliographic record**, **Authority record (CONOR)**, **Field 996/997**, **Field 998** and **COBIB.SI** classes)
- button for displaying the list of search prefixes and suffixes and limiting suffixes (the button is available for "Search request" in expert search mode in the search window of the **Bibliographic record**, **Authority record (CONOR)**, **CORES**, **Field 996/997**, **Field 998** and **COBIB.SI** classes)
- button for displaying instructions for scanning
- search buttons
  - **Find** – for finding objects after entering search request
  - **Find all** – for finding all objects (the button is inactive in the search window of the **Bibliographic record**, **Authority record (CONOR)**, **CORES** and **COBIB.SI** classes)
  - **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 found objects (number of hits)
- list of found objects (search results)
- buttons for working with found objects:
  - **Select all** for 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** for transferring the selected object to your workspace
  - **Show** for viewing properties of the selected object
  - **Next 10** for displaying the next ten objects (this button is not available in the search window of the **Bibliographic record**, **Authority record (CONOR)**, **CORES, Field 996/997**, **Field 998** and **COBIB.SI** classes)

[3]The functionality for the **Bibliographic record**, **Field 996/997**, **Field 998** and **COBIB.SI** classes is only enabled by the SOLR search platform.

  - **Next 50** for displaying the next fifty objects (this button is not available in the search window of the **Bibliographic record**, **Authority record (CONOR)**, **CORES, Field 996/997**, **Field 998** and **COBIB.SI** classes)
  - **Next 200** for displaying the next two hundred objects (this button is only in the search window of the **Bibliographic record**, **Authority record (CONOR)**, **CORES, Field 996/997**, **Field 998** and **COBIB.SI** classes)
  - **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.

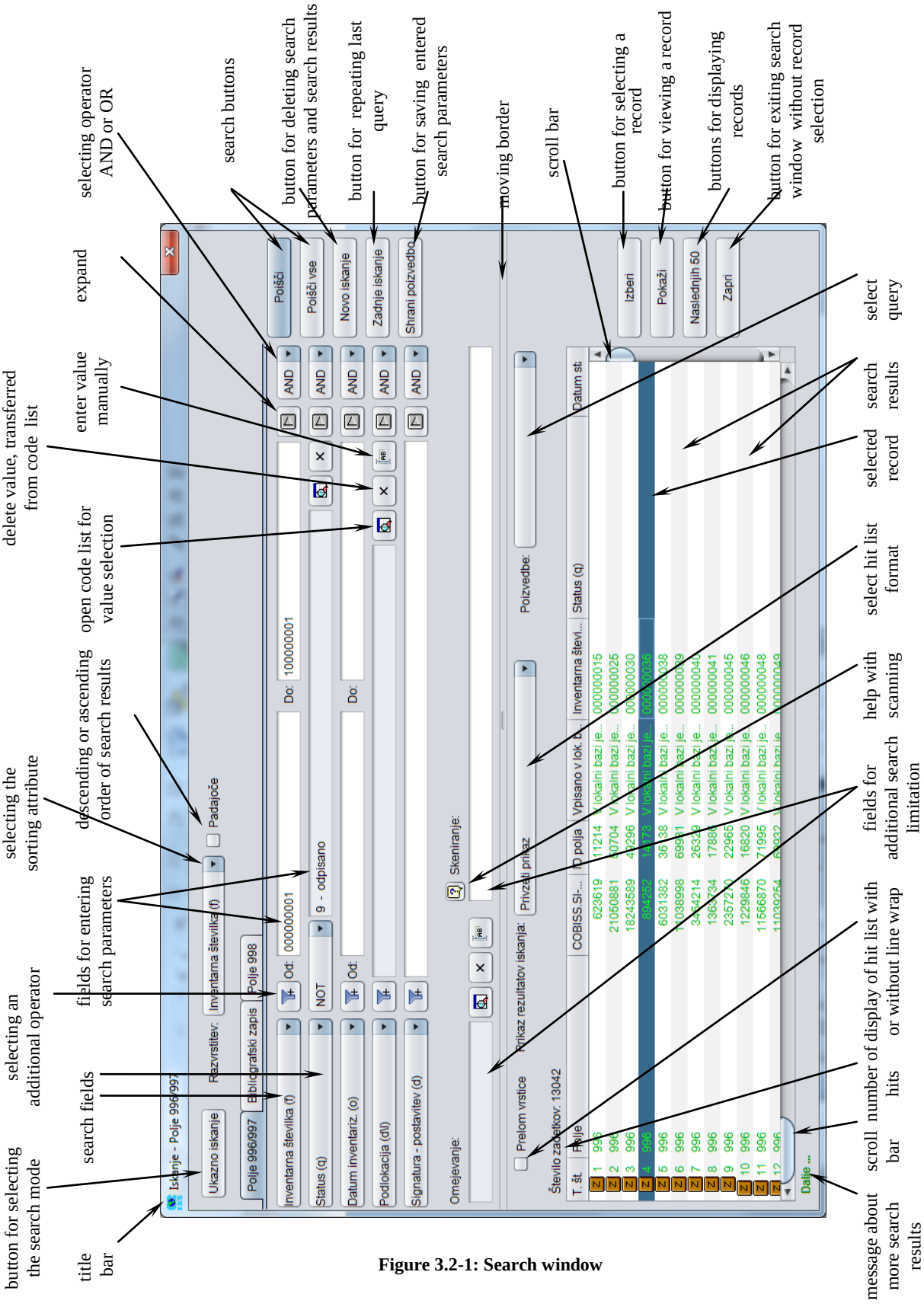

Figure 3.2-1: Search window

7. Click the **Find** button.

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

Note:

If you start a search in the advanced search mode and you entered a search request in the expert search mode before that, the request is deleted.

If you start a search in the expert search mode and you entered a search request in the advanced search mode before that, the request is deleted

   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.SI** 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.SI** 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 software 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 display of the next 10 objects by clicking the **Next 10** button, the display of the next 50 objects by clicking the **Next 50** button and the display 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[3]:

- EMPTY

[3]The functionality in **Bibliographic record**, **Field 996/997**, **Field 998** and **COBIB.SI** classes is only enabled by the SOLR search platform.

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:

Logical operations are performed in a specifically defined sequence. When logical operations are performed, the operators NOT, EMPTY and NOTEMPTY are considered first, followed by the operator AND, and lastly, the operator OR.

Example:

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

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

   To ***remove*** an attribute from the hit list format attributes, highlight it under "Hit list format attributes", and then click the **Remove** button.

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.
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.

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