

COBISS[®]

Co-operative Online Bibliographic System & Services

COBISS3 Basic Guidelines

V6.8-00(03)

User Manual

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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with the COBISS3, V6.8-00(03) software, and is also valid for all future software versions until it is either withdrawn, or another electronic version is published.

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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.
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 data 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.).

C.1 SOFTWARE POINTS FOR COBISS3 SOFTWARE MODULES

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

Software point label	Module / event name	Description
C3_ACQ	Acquisition	Shows data about the member who requested the purchase of material
C3_CIR	Loan (<i>Circulation</i>)	Shows data about the member and material 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 (<i>Refresh workspace</i>)	Adjusts the list of objects on the workspace to the current state of objects in the database
C3_FRM_GET_OBJECT	View object attributes (<i>View object</i>)	Shows attributes of the selected object in editor or viewer
C3_FRM_GET_OBJECTS	Searching for objects (<i>Search window</i>)	Shows one or more found objects in search window
C3_FRM_INVOKE	Invoke method through network (<i>Invoke method</i>)	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 (<i>Print object label</i>)	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
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

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

Software point label	Report label ¹	Report name (description)
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_000627	LOAN-Mb-01	Selected members
C3_RPT_DE_000628	LOAN-Mb-02	Active members
C3_RPT_DE_000629	LOAN-Mb-03	List of members with notes
C3_RPT_DE_000630	LOAN-Mb-04	Deleted members
C3_RPT_DE_000631	LOAN-Mb-05	Members – changed details
C3_RPT_DE_000632	LOAN-Mb-06	Active members – by department
C3_RPT_DE_000642	LOAN-MM-06	Recipients of e-mail notification
C3_RPT_DE_000646	LOAN-TR-01	Transactions for member - membership card No.
C3_RPT_DE_000647	LOAN-TR-02	Transactions for member - ID No.
C3_RPT_DE_000648	LOAN-TR-03	Transactions involving material
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

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.

Software point label	Report label ¹	Report name (description)
C3_RPT_DE_00096	LOAN-MM-04	Notification about a loan period expiry date (mail) ⁵
C3_RPT_DE_00097	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
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_001213	LOAN-Mb-04	Deleted members ⁹
C3_RPT_DE_001312		Returned material ¹⁰
C3_RPT_DE_001314		Reservation cancellations (daily) (reservation processing) ¹¹
C3_RPT_DE_001315		List of deleted reservations ¹²
C3_RPT_DE_001316		Notification about reservation via COBISS/OPAC (e-mail) ¹³
C3_RPT_DE_001318		Notification about reservation cancellation via COBISS/OPAC (e-mail) ¹⁴
C3_RPT_DE_001320		Reservation cancellations (Reservation processing) ¹⁵
C3_RPT_DE_001328	LOAN-ON-01	Overdue notices ¹⁶
C3_RPT_DE_001467		E-notifications ¹⁷
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 ¹⁸
C3_RPT_DE_001697		Lending form (all departments)
C3_RPT_DE_001758	LOAN-EXP -01	List of uncollected debts
C3_RPT_DE_001759	LOAN-Mb-08	List of members with debts

⁵ Up until V5.3-04 designation C3_RPT_DE_000640.

⁶ Up until V5.3-04 designation C3_RPT_DE_000641.

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 V5.3-04 designation C3_RPT_DE_000630.

¹⁰ Up until V6.4-00 designation C3_RPT_DE_000636.

¹¹ Up until V6.4-00 designation C3_RPT_DE_000829.

¹² Up until V6.4-00 designation C3_RPT_DE_000908.

¹³ Up until V6.4-00 designation C3_RPT_DE_000937.

¹⁴ Up until V6.4-00 designation C3_RPT_DE_000941.

¹⁵ Up until V6.4-00 designation C3_RPT_DE_000822.

¹⁶ Up until V6.4-00 designation C3_RPT_DE_001008.

¹⁷ Up until V6.4-00 designation C3_RPT_DE_001182.

¹⁸ Up until V5.3-04 designation C3_RPT_DE_000635, up until V6.4-00 designation C3_RPT_DE_001124.

Software point label	Report label ¹	Report name (description)
C3_RPT_DE_001819	ILL-DM-B01	Material on loan – by customers/date of loan/date of return ¹⁹
C3_RPT_DE_001854		Listek s podatki o rezervaciji ²⁰
C3_RPT_DE_001855		Novoprispele rezervacije (obdelava rezervacij) ²¹
C3_RPT_DE_001856		Dnevni seznam rezervacij (obdelava rezervacij) ²²
C3_RPT_DE_001857		Zadolžnica za novoprispele rezervacije ²³
C3_RPT_DE_001918	LOAN-TR-05	Members with highest number of loans
C3_RPT_DE_001931		Kopija
C3_RPT_DE_001932		Račun ²⁴
C3_RPT_DE_001933		Storno računa ²⁵
C3_RPT_DE_001937		Dobropis
C3_RPT_DE_001972		Vpisnica
C3_RPT_DE_002099	I-TR-04	Seznam blagajniških transakcij ²⁶
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.

¹⁹ Up until V6.4-00 designation C3_RPT_DE_000424.

²⁰ 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.

²¹ 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.

²² 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.

²³ Up until V5.3-04 designation C3_RPT_DE_000798, up until V6.4-00 C3_RPT_DE_001137 and up until V6.8-00(03) C3_RPT_DE_001317.

²⁴ Up until V6.4-00 designation C3_RPT_DE_000696, up until V6.8-00(03) designation C3_RPT_DE_001745.

²⁵ Up until V5.3-04 designation C3_RPT_DE_001014, up until V6.8-00(03) designation C3_RPT_DE_001180.

²⁶ Up until V6.8-00(03) designation C3_RPT_DE_001652.

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.