

## 12.1 MODULES AND CLASSES

This is the part of the browser window displaying the complete structure of the COBISS3 software.

The following classes are included in the COBISS3/Cataloguing module:

- **Bibliographic record**
- **Authority record (CONOR)**
- **Authority record (SGC)**
- **CORES**
- **Cataloguing counters**

In front of every class name is an icon with its letter designation, "B1" stands for a bibliographic record, "Cn" for a CONOR database authority record, "Cs" for an SGC database authority record, "Cr" for a CORES database record and "Ct" for cataloguing counters. The icon for classes is green and indicates records in the MARC format.

Once you select a class in the COBISS3/Cataloguing software module, you can perform the following methods:

- The **Class / New object** for setting a counter (see chapter 12.1.9) – the method is only available in the **Cataloguing counters** class
- the **Class / Search** method or the **Class / Search by key** method for finding records from the selected class (see chapter 4 or chapter 12.1.1)
- the **Class / Create report from queue** method for sending records from queue to destinations (see *COBISS3 Basic Guidelines User Manual*)
- the **Class / Add to report queue** method for adding selected records to report queue (see *COBISS3 Basic Guidelines User Manual*)
- the **Class / Send** method for sending selected records to destinations (see *COBISS3 Basic Guidelines User Manual*)
- the **Class / Hit list formats** method for defining hit list formats (see chapter 4.5 or chapter 12.1.2)
- the **Class / Cataloguing user interface** method for opening the cataloguing user interface (see chapter 12.1.4)
- the **Class / Prepare records for printing** method for printing several records at once (see chapter 12.1.5) – the method is not available for records from the CORES database
- the **Class / Show database information** method for displaying information on the database (see chapter 12.1.6)
- the **Class / Catalogue** window for searching for material and displaying the selected bibliographic records and corresponding holdings data from the local database in the COMARC format (see

*COBISS3/Interlibrary Loan User Manual*, chapter 2.2 and  
*COBISS3/Loan User Manual*, chapter 4.11)

- the **Class / Export records** method for exporting records in various formats (see chapter 12.1.7) – the method is only available in the **Bibliographic record** class
- the **Class / Typology verification** method for verifying the typology or unlocking an already verified typology (see chapter 12.1.8) – the method is only available in the **Bibliographic record** class
- the **Class / Deleted records** for viewing and printing the list of deleted records for each library (see chapter 12.1.9) – the method is only available in the **Bibliographic record** class
- the **Class / Records updated in COBIB** method for searching and viewing records that were updated in the shared database (see chapter 6.2.1.1) – the method is only available in the **Bibliographic record** class



Tip:

You can also select the methods from the **Class** menu from the shortcut menu.

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## 12.1.1 Searching by key

Use the unique record ID (e.g. COBISS.XX-ID for a bibliographic record) to search by key.


### *Procedure*

1. In the **Modules and classes** pane select the relevant class and then the **Class / Search by key** method.

The **Search by key** window will open.



Tip:

The quickest way to open the **Search by key** window is to press the <F4> key after you selected the class or click the  icon in the toolbar, or double-click the class.

2. Enter the record ID for the bibliographic or authority record.
3. Click the **OK** button.

The record is loaded to the workspace.

Note:

*In the **Bibliographic record** class you can search by key only on the basis of IDs of bibliographic records that are in the local database.*

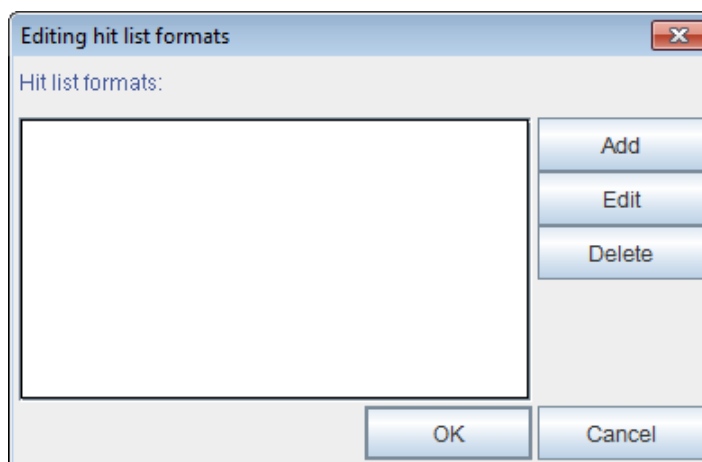
## 12.1.2 Hit list formats and predefined attributes

For each class you can define different format types in the browser, which you can use to display the hit lists in the search window.

### *Procedure*

1. In the **Modules and classes** pane, select the desired class and then 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.



**Figure 12.1-1: Editing hit list formats window**

2. Add a new hit list format or edit (see chapter 12.1.2.1) or delete (see chapter 12.1.2.2) the existing one.
3. Click the **OK** button.



Note:

*The defined hit list formats are bound to your username.*

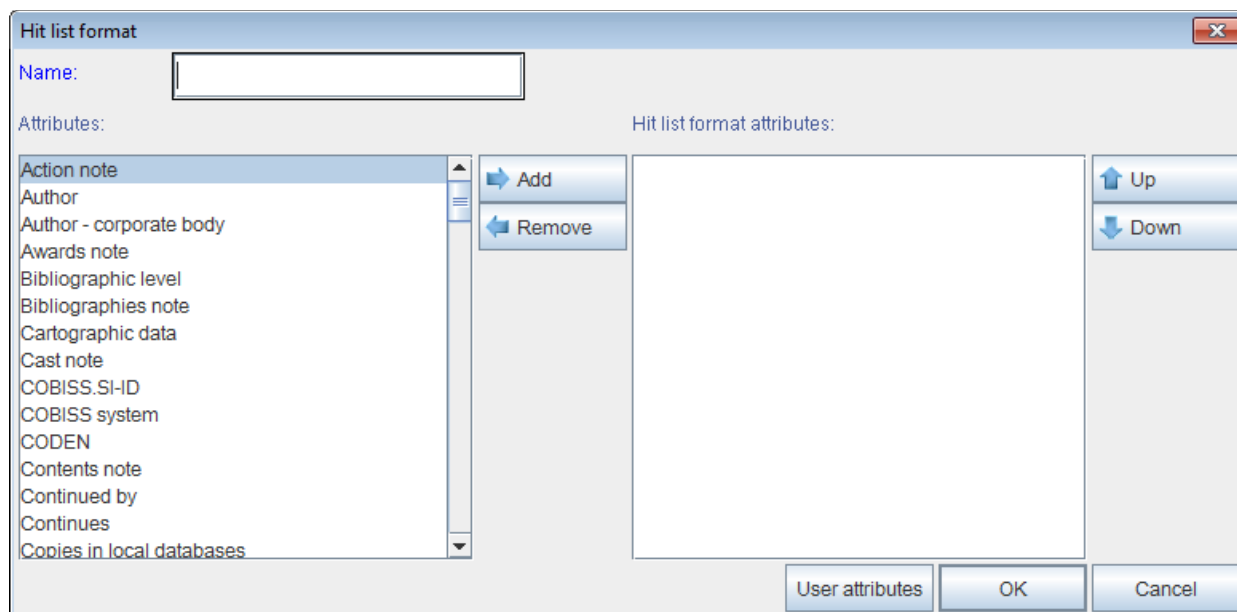
### 12.1.2.1 Adding and changing hit list formats

The list of hit list formats that you defined for each class can be updated with a new format, or an already defined format can be changed.

### *Procedure*

1. To **add** a new format, click the **Add** button in the **Editing hit list formats** window; to **change** an already defined format, click the **Edit** button.

The **Hit list format** window will open.



**Figure 12.1-2: Hit list formats window**

2. Under "Name" enter or change the format name.
3. Define the format attributes.

If you wish to **add** an attribute to the hit list format attributes, select it in the "Attributes" list and click the **Add** button.

If you wish to **remove** an attribute from the hit list format attributes, select it in the "Attributes" list and click the **Remove** button.

4. If necessary, sort the hit list format attributes. To move an attribute up or down, select it and click the **Up** or **Down** button.



**Tip:**

If you wish to define additional attributes or change or delete the additionally defined attributes, click the **User attributes** button. The **User attributes** window will open where you can add or change attributes (see chapter 12.1.3.1) or delete them (see chapter 12.1.3.4).

5. Click the **OK** button.

The lists of previously defined attributes with the corresponding fields and subfields from which data can be display in the hit lists in bibliographic databases, authority databases and the CORES database can be found in the appendices *E.1*, *E.2*, *E.3* and *G.9*.

### 12.1.2.2 Deleting hit list formats

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

**Procedure**

1. Select the format from "Hit list formats" list. The selected line in the list 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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### 12.1.3 Hit list formats and attributes defined by the user

In addition to predefined attributes, you can also define your own attributes for hit list formats by clicking the **User attributes** button in the **Hit list formats** window.

The **User attributes** window will open.

#### 12.1.3.1 Adding and changing attributes defined by the user

Attributes defined by the user are edited in the **User attributes** window. In the beginning, the list is empty. For the previously defined attributes, the following data is displayed:

- under "Name" – name of attribute defined by the user
- under "Format data" – fields and subfields of each attribute

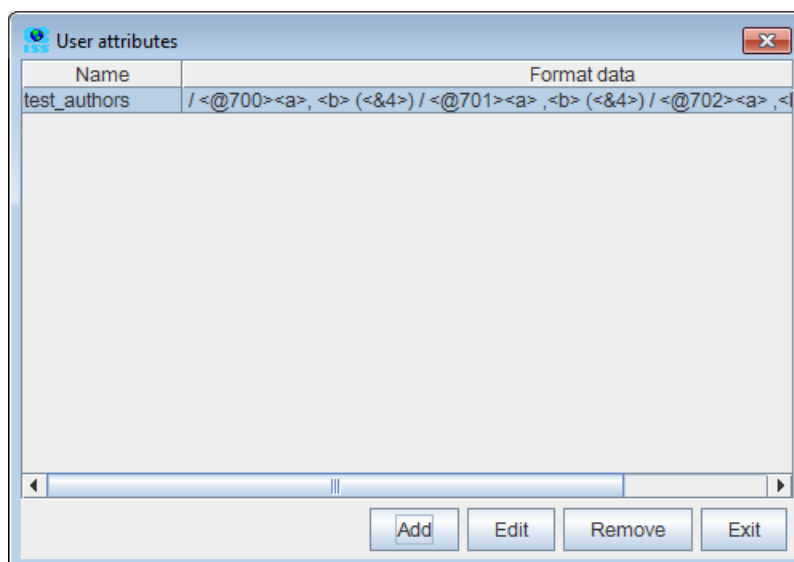


Figure 12.1-3: User attributes window

**Procedure**

1. To **add** a new user attribute, click the **Add** button, to **change** a predefined user attribute that you selected in the list, click the **Edit** button.

The **Hit list format attribute** window will open.

**Figure 12.1-4: Hit list format attribute window**

The "List of fields" contains fields that were already added to the attribute. In the beginning, the list is empty. It is not possible to enter data directly into the list. The list can be updated (see chapter 12.1.3.2). If you select a row in the list, the data is transferred to the entry fields under "Field", "Separator", "Subfields" and "Order of subfields defined".

Under "Format data" the whole format defined by the user is displayed. In the beginning, the field is empty.

2. Under "Name" enter or change the attribute name.
3. Under "Field" enter the field number.
4. Under "Separator" enter what you wish to add before the field in the hit list display. You can use one or several characters. The default separator is the "/" sign (see chapter 12.1.3.3).

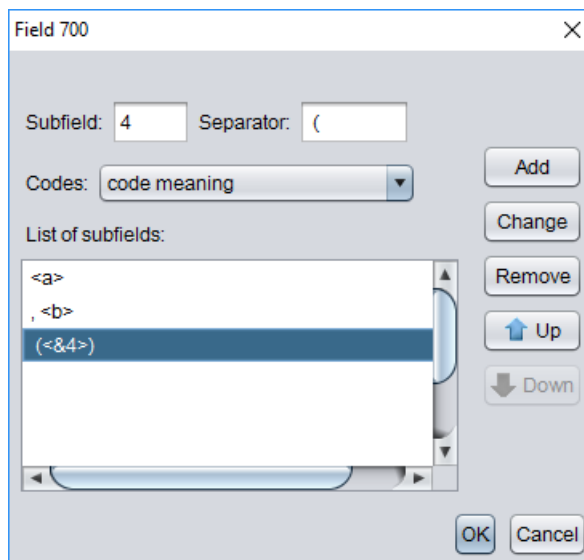


Note:

*The default separator "/" automatically has a space added before and after it.*

- Next to the **Subfields** button is the list of predefined subfields. In the beginning, the field is empty. Click the **Subfields** button.

The **Field ???** window will open. The "???" characters represent the numbers of the field included in the format.



**Figure 12.1-5: Field ??? window**

The "List of subfields" includes subfields that you already added to the field. In the beginning the list is empty. It is not possible to add data directly into the list. The list can be updated (see chapter 12.1.3.2). If you select a row in the list, the data is transferred to the entry fields under "Subfield", "Separator" and "Codes".

- Under "Subfield" enter the subfield designation.
- Under "Separator" enter what you wish to add before the subfield in the hit list format. You can use one or several characters. The default separator is the ";" sign (see chapter 12.1.3.3).



Note:

*The default separator ";" automatically has a space added before and after it.*

- The drop-down list under "Codes" is used only for coded subfields. Use it to select a hit list format to display a coded subfield.
- Once you add all the subfields for the hit list format to the list, click the **OK** button.

Return to the **Hit list format attribute** window.

- If you wish to display the subfields in the same order as they were defined in the attribute, the checkbox under "Order of subfields defined" must be ticked.
- Once you add all the fields to be displayed, click the **OK** button.

Return to the **User attributes** window.

12. To exit the **User attributes** window, click the **Exit** button.

### 12.1.3.2 Editing lists of fields and subfields

This procedure describes how to add, change or delete rows under "List of fields" in the **Hit list format attribute** window and the rows under "List of subfields" in the **Field ???** window.

#### *Procedure*

1. To **add** a field (subfield) to the list, click the **Add** button.

The data under "Field", "Separator", "Subfields" and "Order of subfields defined" ("Subfields", "Separator" and "Codes") is added to the bottom of the list.

2. To **change** a field (subfield) in the list, select the field (subfield) first, and then click the **Change** button.

3. If necessary, edit the order of fields (subfields) in the list. To move a field (subfield) up or down a row, select it and click the **Up** or **Down** button.

4. To **delete** a field (subfield) in the list, select the field (subfield) first, and then click the **Remove** button.

### 12.1.3.3 Rules for displaying user defined attributes

To the "List of fields" in the **Hit list format attribute** window the data is transferred from the entry fields under "Field", "Separator", "Subfields" and the data from the "Order of subfields defined" checkbox.

Each row has the following form:

- **Separator** + "<@" + **Field** + ">" + **Subfields**

The "@" sign means that you ticked the checkbox under "Order of subfields defined". If the checkbox has not been ticked, the "@" sign before the field designation will not be displayed.

Under "Subfields" all elements from the list of subfields from the **Field ???** window are displayed in one row. The individual element comprises data that is transferred from the entry fields under "Subfield", "Separator" and "Codes".

The form of every row depends on the values selected in the drop-down list under "Codes":

- **Separator** + "<" + **Subfield** + ">" if the selected value is *code*
- **Separator** + "<&" + **Subfield** + ">" if the selected value is *code meaning*
- **Separator** + "<%" + **Subfield** + ">" if the selected value is *code and code meaning*



**Tip:**

If you wish that the data is displayed with spacing, then the spaces must be part of the separator.

The following rules apply when displaying data:

- The defined separators are always displayed in front of the field or subfield.
- If the defined separator is brackets – "(" or "[" or "{", the second bracket is added automatically after the field or subfield – ")" or "]" or "}".
- Before the first field in the display there is no separator regardless of the separator you entered for the field. The separator you specified for the first field will only be displayed for field repetitions.
- Before the first subfield in the field there is no separator regardless of the separator you entered for the subfield. The separator you specified for the first subfield will only be displayed for subfield repetitions.
- If the "Order of subfields defined" checkbox is ticked, the order of subfields is taken into account, as we defined it in the attribute; otherwise subfields are displayed in the same order as in the record.
- The drop-down list under "Codes" influences the display of coded data. The possible values are:
  - *code* – the subfield content is displayed
  - *code meaning* – the value from the code list is displayed
  - *code and code meaning* – the subfield content is displayed, followed by "-", followed by the value from the code list

**Example:**

If you wish to display the authors with relator codes in the search window, define the attributes as follows:

/ <@700><a>, <b> (<&4>)

/ <@701><a>, <b> (<&4>)

/ <@702>/<a>, <b> (<%4>)

COMARC format display:

701 aMenart bJanez 4070

701 aKovič bKajetan 4070

701 aZlobec bCiril 4070

701 aPavček bTone 4070

702 aModer bJanko 4730

Display of attributes in the search window:

Menart, Janez (author) / Kovič, Kajetan (author) / Zlobec, Ciril (author) / Pavček, Tone (author) / Moder, Janko (730 – translator)

### 12.1.3.4 Deleting user defined attributes

User defined attributes can be deleted in the **User attributes** window.

#### *Procedure*

1. In the list of user defined attributes, click the attribute to select it. The attribute will become highlighted.
2. Click the **Remove** button.  
The attribute is removed from the list.

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### 12.1.4 Opening the cataloguing user interface

Open the cataloguing user interface in the browser.



#### *Procedure*

1. In the **Modules and classes** pane select the relevant class and then the **Class / Cataloguing user interface** method.

The **Bibliographic record** or **Authority record (CONOR)** or **CORES** window will open.



Tip:

The quickest way to open the **Bibliographic record** or the **CORES** window is to click the  icon in the toolbar after you selected the class. The quickest way to open the **Authority record (CONOR)** window is to click the  icon.

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### 12.1.5 Preparing records for printing

In the browser you can find and select several records and print them at once.

#### *Procedure*

1. In the **Modules and classes** pane, select the desired class and select the **Class / Prepare records for printing** method.

The **Search – Bibliographic record (<local database acronym>)** window, the **Authority record (CONOR)** window or the **Authority record (SGC)** window will open.

2. Enter the appropriate query and perform the search. The detailed search procedure is described in chapter 4, chapter 9.2 and chapter 10.2.
3. Select the desired record(s) in the hit list and click the **Select** button.  
The **Print records** window will open.
4. Next, follow steps from 3 to 6 of the procedure described in chapter 6.7.4.

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## 12.1.6 Showing database information

You can show database properties in the browser. In the **Bibliographic record** class, only local database properties are displayed.

### *Procedure*

1. In the **Modules and classes** pane, select the desired class and select the **Class / Show database information** method.

The **Message** window will open, displaying the following information:

- (local) database acronym
- number of records in the (local) database
- number of records, created in the (local) database

2. Click the **OK** button.

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## 12.1.7 Exporting records

In the browser you can find and export records in various formats (e.g. MARC 21, MARCXML (MARC 21 in xml), Dublin Core etc.). The export of bibliographic records takes place from the local database.

To export records, the CAT\_EXPORT privilege is required.



Note:

*Records can be exported by libraries that especially requested to do so.*

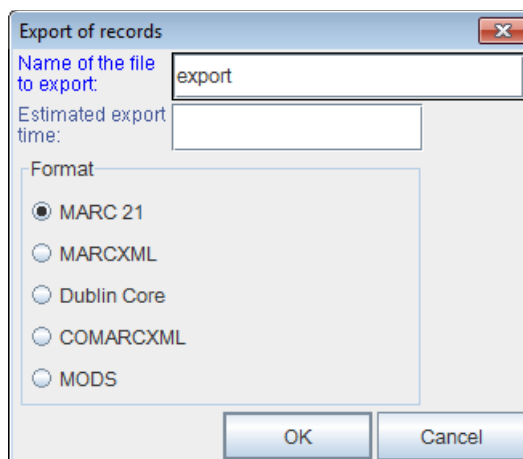
### *Procedure*

1. In the **Modules and classes** pane, select the **Bibliographic record** class and then the **Class / Export records** method.

The **Search – Bibliographic record (<local database acronym>)** window will open.

2. Enter the search query and perform the search.
3. Highlight the desired record(s) and click the **Select** button. To select all found records (without highlighting), click the **Select all** button.

The **Export of records** window will open:



**Figure 12.1-6: Export records window**

4. Under "Name of the file to export" enter the name of the file to which the records will be saved. The name *export* is entered automatically, but it can be changed. If you enter a file name that already exists the software will alert you.
5. Under "Estimated export time" enter and/or set up the date and time when the export will be performed (dd.mm.yyyy hh:mm:ss). If you do not fill in the entry field, the export process will start immediately.

If you enter a later time when the export will be performed, the export is saved to jobs. Stored jobs can be edited or deleted at a later time (the procedure of editing jobs is described in the *COBISS3 Basic Guidelines* user manual).



**Tip:**

The time of activating the preparation of exporting data is usually set up for larger exports (> 50 000 records) as it is recommended to prepare them outside office hours.

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

By pressing the <D> key, the current date and time are transferred to the field. Each time you press the button again, the date entered is more recent by one day.

By pressing the <W> key, the date and time entered will be by one week more recent than the current date. Each time you press the button again, the date entered is more recent by one week.

By pressing the <M> key, the date and time entered will be by one month more recent than the current date. Each time you press the button again, the date entered is more recent by one month.

To delete the entered time and date, press the space bar.

6. Under "Format" select the format in which you will export the records:

- *MARC 21* for exporting in MARC 21 format<sup>1</sup> (ISO 2709 structure)
- *MARCXML* for exporting in MARC 21 format<sup>2</sup> (xml structure)
- *Dublin Core* for exporting in Dublin Core format<sup>3</sup>
- *COMARCXML* for exporting in COMARC format (xml structure)
- *MODS* for exporting in MODS format<sup>4</sup>

7. Click the **OK** button.

The message will be displayed saying that the procedure of exporting records in the selected format has begun and the message that you will receive an e-mail when the procedure is finished. To close the window, click the **OK** button.



Note:

*Only one procedure of exporting records can be carried out in the library at the same time.*

*If you start another procedure while the procedure is still **going on**, you will receive a notification that will alert you that you must wait with the procedure until the first procedure is finished. The message also includes the name of the user who started the export, the name of the file and the time when the procedure started. To close the window, click the **OK** button.*

*If the procedure for exporting records is **not going on yet** (it is prepared, but will start later), but you start another procedure, you will receive a notification asking you to decide whether you wish to cancel the first procedure and start a new one (**Yes** button) or perform the first procedure (**No** button). The message also includes the name of the user who started the export, the name of the file and the intended time for starting the procedure.*

When the procedure for exporting records is finished, you will receive a notification by e-mail. It will also include the location of the file with these records.

Find the file where the records for exporting are saved. The file is compressed (zip) and can be type *mrc* or *xml*.

### Options

The export of records to the formats MARC 21 and Dublin Core via the COBISS3/Reports software module is intended for exporting up to 2000 records. The exports from the **Bibliographic record** class are intended for a larger number of records.

## 12.1.8 Typology verification

You can verify and lock a typology, or unlock an already locked typology. This can be done only in COBIB.

<sup>1</sup> <http://www.loc.gov/marc/bibliographic/ecbdhome.html>

<sup>2</sup> <http://www.loc.gov/standards/marcxml/>

<sup>3</sup> <http://dublincore.org/>

<sup>4</sup> <http://www.loc.gov/standards/mods/>



Note:

*When the subfield with typology is locked, the contents of field 970 cannot be changed any more.*

To verify a typology, the CAT\_LOCKTD privilege is required.

### **Procedure**

1. In the **Modules and classes** pane, select the **Bibliographic record** class and then the **Class / Typology verification** method.

The **Search – Bibliographic record (COBIB)** window will open.

2. Enter the search query and perform the search.
3. Highlight the desired record(s) and click the **Select** button.

The **Typology verification: running no. nn** window will open. In the top part of the window, the first of your selected records will be displayed in the COMARC/B format, whereas in the lower part of the window, the typology (if it exists in the record) will be displayed or the space will remain blank.

4. If you wish to verify and lock the typology, click the **Lock** button. If you wish to unlock an already verified typology, click the **Unlock** button.

A corresponding message will appear in the lower part of the window.

5. Click the **Forward** button.

The next bibliographic record you selected from the hit list will be displayed.

6. Once you are finished locking and/or unlocking the typologies, click the **Exit** button. By pressing this button, you can abort the procedure at any time.

The number of edited records will be displayed in the **Message** window.

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## **12.1.9 Deleted records**

Bibliographic records that were deleted in an individual library can be searched for by cataloguers of this library who can check, who and when deleted the record and if the record was only deleted from the local database or also from COBIB.

### **Procedure**

1. In the **Modules and classes** pane, select the **Bibliographic record** class and then the **Class / Deleted records** method.

The **Search – Deleted records** window will open.

2. Enter the search query and perform the search.

**Tip:**

Under "Deletion date", the time period of the last year is already entered automatically, but can be changed.

3. If you wish to use the search results for further processing or print them, you can copy them to an Excel file.

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## 12.1.10 Counters

You can set up counters for individual subfields in the bibliographic and authority databases.

To set up and edit counters, the CAT\_EDITTYPE privilege is required.

### 12.1.10.1 Adding a counter

Depending on the demand, set up as many counters as you need for setting individual numbers.

***Procedure***

1. Select the **Cataloguing counters** class.
2. Select the **Class / New object** method.

The **Cataloguing counters** window will open.

**Figure 12.1-7: Cataloguing counters window**

3. Under "Name" type in a short name for the counter.
4. Under "Type of record" select the type of record (e.g. bibliographic record) from the drop-down list.
5. Under "Subfield" enter the subfield in which it is possible to start the counter (e.g. 020b, 021b, etc.).
6. Under "Next value" enter the next number that will be copied from the counter to the subfield.
7. Under "Maximum value" enter the maximum number of the counter.
8. Under "Length" define the number of digits that the number consists of, including the leading zeros in the beginning. If you do not enter the length, the number is entered to the subfield without leading zeros.



Note:

*The largest number of digits permitted is 10.*

9. Under "Prefix" you can enter text that will be entered into the subfield in front of the number. It is also possible to enter designations to the entry field, which enable the automatic entry of the current date to an individual subfield:
  - <YYYY> – year (e.g. 2014)



- <YY> – year (e.g. 14)
- <MM> – month
- <DD> – day

10. To enter a note, click the **Note** button.
11. When you wish to enable the use of the counter, tick the "Activity" checkbox.
12. Enter the conditions for selecting the counter (see chapter 12.1.10.1.1).
13. To save the data, click the **OK** button.



Example:

If you enter e.g.  $M<YYYY><MM>$  under "Prefix" and the record fulfills the condition e.g.  $001c = m$ , the current year (e.g. 2014) and current month (e.g. 05) are entered to a certain subfield after prefix M along with a four digit number from the counter (e.g. M2014050001).

#### 12.1.10.1.1 Entering numbering conditions

If you wish that the software offers a certain counter, the record must meet the numbering conditions. The software will offer the counter for the record that meets all the required conditions (defined subfield and its value).

#### Procedure

1. In the **Cataloguing counters** window, click the **New object** button.

The **Condition** window will open for adding the subfield and its value.

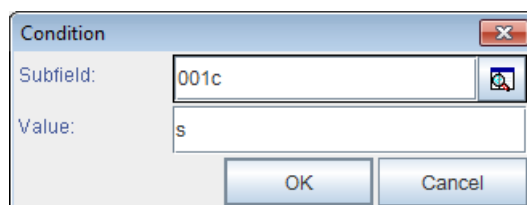


Figure 12.1–8: Entering numbering conditions

2. Under "Subfield" select the subfield from the code list.
3. Under "Value" enter the value for the selected subfield from the code list.
4. Click the **OK** button.
5. If you wish, you can now enter the next condition as described in steps 1 to 4.