

COBISS[®]

Co-operative Online Bibliographic System & Services

COBISS3/ Serials

V6.10-00

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 August 2005 onwards. Its content corresponds with the COBISS3, V6.10-00 software, and is also valid for the future software versions until it is either withdrawn, or another electronic version is published.

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CONTENTS

PREFACE	PREFACE-1
ABOUT THE MANUAL	ABOUT THE MANUAL-1
1 INTRODUCTION.....	1-1
2 DEFINING MATERIAL.....	2-1
2.1 Relationship between material and bibliographic record.....	2.1-1
2.1.1 Downloading a record from the shared database to the local database	2.1-1
2.1.2 Displaying the record in the COMARC format.....	2.1-2
2.2 Entering the material.....	2.2-1
2.2.1 Downloading bibliographic data from the shared database.....	2.2-2
2.2.2 Downloading bibliographic data from selected catalogues of other foreign libraries.....	2.2-2
2.3 Changing the relationship between the holdings data and the bibliographic record.....	2.3-1
2.4 Deleting the material.....	2.4-1
3 PURCHASE OF SERIALS	3-1
3.1 Selecting the serials to be ordered	3.1-1
3.1.1 Entering an order item	3.1-1
3.1.2 Deleting an order item	3.1-2
3.2 Ordering serials.....	3.2-1
3.2.1 Preparing an order	3.2-1
3.2.1.1 Entering general data.....	3.2-2
3.2.1.2 Entering an item	3.2-3
3.2.1.2.1 Entering copies and funds.....	3.2-5
3.2.1.2.2 Defining a requestor.....	3.2-6
3.2.1.2.3 Defining dependent items	3.2-7
3.2.1.2.4 Amount calculation and conversion of foreign prices	3.2-7
3.2.2 Adding an item to an order	3.2-8
3.2.3 Preparing an order on the basis of the material	3.2-9
3.2.4 Transferring an item to another order	3.2-9
3.2.5 Viewing the amounts of unsubmitted orders by funds	3.2-10
3.2.6 Deleting an order	3.2-10
3.2.7 Submitting and sending an order	3.2-11
3.2.8 Changing an order validity date.....	3.2-13
3.2.9 Adding an item for supplement	3.2-13
3.2.10 Linking an item to a field 997	3.2-14
3.2.11 Ordering a monographic series.....	3.2-15
3.3 Next period or volume	3.3-1
3.3.1 Renewing an order for the next period	3.3-1
3.3.2 Preparing fields 997 for the next volume	3.3-2
3.3.2.1 Deleting fields 997 prepared for next volume.....	3.3-3
3.4 Cancelling an order and sending an order cancellation	3.4-1
3.5 Closing check-in	3.5-1

3.6	Prepaying serials	3.6-1
3.6.1	Entering an advance.....	3.6-1
3.6.1.1	Entering general data.....	3.6-2
3.6.1.2	Entering an item	3.6-3
3.6.1.2.1	Selecting fields 997 to enter the price.....	3.6-4
3.6.2	Closing an advance	3.6-4
3.6.3	Sending an advance to the accounting department	3.6-5
3.6.4	Entering an advance payment.....	3.6-6
3.6.5	Closing an advance, sending an advance to the accounting department and entering advance payment simultaneously.....	3.6-7
3.6.6	Changing an advance status	3.6-7
3.6.6.1	Changing the sending of advance to the accounting department	3.6-8
3.6.6.2	Changing an advance payment.....	3.6-8
3.7	Paying for serials.....	3.7-1
3.7.1	Entering an invoice	3.7-1
3.7.1.1	Entering general data.....	3.7-2
3.7.1.2	Entering an item	3.7-3
3.7.1.3	Entering indirect cost of acquisition.....	3.7-4
3.7.2	Closing an invoice	3.7-5
3.7.3	Sending an invoice to the accounting department	3.7-6
3.7.3.1	Exporting an invoice to accounting system.....	3.7-6
3.7.4	Entering invoice payment	3.7-6
3.7.5	Closing an invoice, sending an invoice to the accounting department and entering invoice payment simultaneously	3.7-8
3.7.6	Changing the invoice status	3.7-9
3.7.6.1	Changing the sending of the invoice to the accounting department.....	3.7-9
3.7.6.2	Changing the invoice payment	3.7-9
3.8	General procedures	3.8-1
3.8.1	Changing a fund.....	3.8-1
3.8.2	Apportionment by funds	3.8-1
3.8.3	Changing a discount rate.....	3.8-2
3.8.4	Sorting acquisition document items.....	3.8-2
3.8.5	Changing a mailing address.....	3.8-3
3.8.6	Printing a label with partner's address on it	3.8-3
3.8.7	Entering an invoice for indirect cost of acquisition	3.8-3
4	UNSOLICITED PUBLICATIONS.....	4-1
4.1	Entering a list of unsolicited publications	4.1-1
4.1.1	Entering general data	4.1-2
4.1.2	Entering an item.....	4.1-3
4.2	Deleting a list of unsolicited publications	4.2-1
4.3	Closing the entry of a list of unsolicited publications.....	4.3-1
4.3.1	Issuing a legal deposit receipt confirmation	4.3-3
4.4	Preparing fields 997 for the next volume	4.4-1
4.5	Adding an item for supplement.....	4.5-1
4.6	Closing check-in	4.6-1
4.7	Submitting and sending a letter of thanks to the donor.....	4.7-1
4.8	General procedures	4.8-1
5	ACQUIRING SAMPLE COPIES.....	5-1
5.1	Preparing a sample copy request.....	5.1-1

5.1.1	Entering general data	5.1-1
5.1.2	Entering an item.....	5.1-2
5.2	Submitting and sending a request	5.2-1
5.3	Receiving material	5.3-1
5.4	Returning material to the supplier.....	5.4-1
5.5	General procedures	5.5-1
6	PUBLICATION PATTERN.....	6-1
7	SERIALS CHECK-IN	7-1
8	SENDING SERIALS	8-1
8.1	Defining copies of serials to be sent	8.1-1
8.2	Serials check-in, editing a publication pattern and preparing a shipment of serials	8.2-1
8.2.1	Publication pattern for shipments	8.2-2
8.2.2	Serials check-in.....	8.2-3
8.2.2.1	Serials check-in with manual entry of received issues	8.2-3
8.2.3	Preparing a shipment of serials.....	8.2-4
8.3	Deleting a shipment of serials.....	8.3-1
8.4	Submitting and sending a shipment with a list of serials	8.4-1
8.5	Next period or volume	8.5-1
8.6	General procedures	8.6-1
9	CLAIMS.....	9-1
9.1	Preparing a claim	9.1-1
9.1.1	Undelivered issues.....	9.1-1
9.1.1.1	Transferring items to another claim	9.1-2
9.1.2	Received request for advance payment or received invoice.....	9.1-3
9.2	Submitting and sending a claim.....	9.2-1
9.3	Closing a claim	9.3-1
9.4	General procedures	9.4-1
10	OVERVIEW OF EVENTS.....	10-1
11	OTHER PROCEDURES.....	11-1
11.1	Maintaining data about partners.....	11.1-1
11.2	Maintaining data about funds.....	11.2-1
11.2.1	Opening a fund	11.2-2
11.2.2	Entering a financier's remittance	11.2-3
11.2.3	Transferring financial means among funds	11.2-4
11.2.4	Readjusting amounts in the fund	11.2-4
11.2.5	Closing a fund.....	11.2-5
11.2.6	Deleting a fund	11.2-5
11.3	Setting up counters.....	11.3-1
11.3.1	Using available numbers	11.3-2
11.4	Preparing an item template	11.4-1
11.4.1	Creating an item template.....	11.4-1
11.4.2	Copying an item to a template.....	11.4-1
11.4.3	Sorting item templates	11.4-2
12	LINKS TO OTHER MODULES AND BIBLIOGRAPHIC DATABASES	12-1

12.1 COBISS3/Acquisitions	12.1-1
12.2 COBISS3/Holdings	12.2-1
12.3 COBISS3/Loan, COBISS2/Loan	12.3-1
12.4 COBISS3/Reports	12.4-1
12.5 COBISS3/Application administration.....	12.5-1
12.6 Bibliographic databases	12.6-1

APPENDICES

A OVERVIEW OF PROCEDURES AND STATUSES	APPENDIX A -1
A.1 Purchase of serials.....	Appendix A.1-1
A.2 Purchase of serials – record of invoices	Appendix A.2-1
A.3 Purchase of serials – record of advances and indirect cost invoices	Appendix A.3-1
A.4 Unsolicited publications.....	Appendix A.4-1
A.5 Acquiring sample copies	Appendix A.5-1
A.6 Sending serials	Appendix A.6-1
A.7 Claims	Appendix A.7-1
B REPORTS	APPENDIX B-1
B.1 Creating reports.....	Appendix B.1-1
B.1.1 Creating and printing reports	Appendix B.1-1
B.1.2 Creating and printing scheduled reports	Appendix B.1-2
B.1.3 Finding saved files containing reports.....	Appendix B.1-3
B.2 Report variables	Appendix B.2-1
B.2.1 System report variables.....	Appendix B.2-1
B.2.2 User report variables	Appendix B.2-2
C REPORT FORMS.....	APPENDIX C-1
C.1 Addressing guidelines	Appendix C.1-1
C.2 Bibliographic description of material and other data	Appendix C.2-1
C.2.1 Order	Appendix C.2-1
C.2.2 Order cancellation.....	Appendix C.2-2
C.2.3 Claims	Appendix C.2-2
C.2.4 Sample copy request.....	Appendix C.2-2
C.2.5 Letter of thanks to the donor.....	Appendix C.2-3
C.2.6 List that accompanies a shipment of exchange publications	Appendix C.2-3
C.2.7 List that accompanies a shipment of legal deposit material.....	Appendix C.2-3
C.2.8 Label	Appendix C.2-3
C.3 Sample reports.....	Appendix C.3-1
D LISTS.....	APPENDIX D-1
D.1 List of reports	Appendix D.1-1
D.2 Entering input parameters for report creation	Appendix D.2-1
D.2.1 List S-L-01.....	Appendix D.2-1
D.2.2 List S-L-02.....	Appendix D.2-1
D.3 Description of individual reports	Appendix D.3-1
D.3.1 S-L-01: List of order items (full format)	Appendix D.3-1
D.3.2 S-L-02: List of invoice items (full format)	Appendix D.3-1

3.2.3 Preparing an order on the basis of the material

The order preparation procedure can be started for the material that has been placed on the workspace first. For the material, prepare an order item, which can be added either to a prepared or to a new order.

Procedure

1. In the **Material** class, find and select the material.
2. Select the **Object / Create order** method.
The **Search – Order** search window will open.
3. Find and select the order. If you wish to prepare a new order, close the search window by clicking the **Close** button.
The item will be prepared and added to the selected order, for which the **Order** editor will open.
4. Continue the order preparation procedure (see chapter 3.2.1).

3.2.4 Transferring an item to another order

An order item can be transferred from a prepared order to either another prepared order or to a new order.

Precondition

The status of the order item must be *order prepared*.

Procedure

1. In the **Order** class, find and select the order.
2. In the list of objects linked to the order, select the item that you wish to transfer. You can select one or more items simultaneously.
3. Select the **Object / Add to order/Transfer to another order** method.
The **Search – Order** search window will open, where you can choose only from entered orders. If you have specified the supplier for the item, the search will be narrowed down to orders for the selected supplier. You can change the search criteria.
4. Find and select the order you wish to add the item to. If you wish to add the item to a new order, close the search window by clicking the **Close** button.
The item will be added to the selected order, for which the **Order** editor will open.
5. Continue the order preparation procedure (see chapter 3.2.1).

3.2.5 Viewing the amounts of unsubmitted orders by funds

You can view the value apportioned by funds for all the entered orders that have not been submitted and sent to suppliers.

Procedure

1. Select the **Order** class and select the **Class / Show the order amounts by funds** method.

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

2. Find and select the order for which you would like to prepare an overview. Unsubmitted orders have the status *entered*.

A window will open where the amount available and the amount tied to unsubmitted orders can be viewed for each fund. A list of numbers and amounts of unsubmitted orders follows. A window will open where the amount available and the amount tied to unsubmitted orders can be viewed for each fund. A list of numbers and amounts of unsubmitted orders follows.

3.2.6 Deleting an order

You can delete an order and order items until you submit and send the order to the supplier.

Precondition

You can only delete orders that have the status *entered*. Delete the order items before deleting the order.

Procedure

1. In the **Order** class, find and select the order.

2. Select the **Object / Edit** method.

The **Order** editor will open.

3. Highlight the item and click the **Delete** button.

The item will be deleted from the order.



Note:

If you delete an item from an order, this does not mean that the item will be deleted from the database as well. For deleting an item from the database see chapter 3.1.2.

In the configuration file, a parameter can be set, which allows deletion of an item from the database when deleting it from an order.

4. Repeat step 3 for all order items.
5. Save the order, which contains no items now.

6. Select the **Object / Delete** method.

**Status after deleting
an order**

Order item

- *entered*

Copy

- *entered*

3.2.7 Submitting and sending an order

When submitting an order, the current date becomes automatically recorded as the order submission date first. Then, depending on the selected sending method, the order is either printed out or sent to the supplier by e-mail.

If you order several copies of one serial and you wish the supplier to send the copies to different addresses of departments, you can select an order report form, when sending the order, by using either the **Object / Print** method or the **Object / Send** method. You can choose from:

- order report by items, with copies and departments being printed out under individual items
- order report by departments, items are summarised by departments

When submitting and sending an order, the default report form is *Order of serials by item*. You must enter the addresses of departments when you enter the information about the home library. The *COBISS3/Application Administration User Manual* deals with entering the information about the home library (see chapter 2).

For each item, as many fields 997 as is the number of copies under this item (i.e. under serial title) will be created when submitting an order. Field 998 will also be created if it has not been created before.



Note:

If a number of copies entered manually into subfield 998c in element 7 differs from 0, you cannot submit the order containing the serial. If you wish to order this serial, you must first enter the number 0 into subfield 998c in element 7.

A publication pattern for the order item and for corresponding fields 997 will be created.

Precondition

The supplier and mailing address have been specified for the order. Order items have been entered.

Procedure

1. In the **Order** class, find and select the order.
2. Select the **Object / Submit and send** method.

A window will open asking if you wish to sort order items by the alphabetical order of serial titles.

3. If you wish to re-sort order items, click the **Yes** button. If you wish to preserve the order of items as it is, click the **No** button.

Under "Submitted", the current date will be registered.

The **Overview and sending of created report** window will open, from where you send the order to predefined or changed destinations. In the *COBISS3 Basic Guidelines User Manual* you can find how to send a report (see chapter 4.5).

A new field 997 with the following data will be prepared for each ordered copy:

- the binding indicator will have the value 0 – *Unbound issues*
- the shelving indicator will have the value compliant with the parameter set in the library's configuration file
- to "Sublocation (d\l)", the library department ID will be transferred
- to "Shelving location (d\i)", the shelving location will be transferred
- "Status (q)" will get the value 1 – *ordered*
- to "Status date (t)", the submission date will be transferred
- "Acquisition type (v)" will get the value a – *purchase*
- to "Purpose of acquisition (w)", the purpose of acquisition will be transferred
- to "Order (x)", the order number and date will be transferred
- to "Supplier (2)", the supplier symbol will be transferred

In addition to that, a field 998 with the following data will also be prepared:

- the shelving indicator will have the value compliant with the parameter set in the library's configuration file
- to "Report date (a)", the current date will be transferred
- to "Institution code (b)", the home library code will be transferred
- under "Number of copies (c)", all elements will be filled up automatically
- "Acquisition indicator (e)" will get the value o – *currently received*
- "General d. (g)" in element c will get the value 0 – *(zero) information not available*
- to "Year (k)", the year of subscription will be transferred; the year is followed by "-"

**Status after
submitting and
sending an order**

If field 998 existed before, you must change the data manually.

Order

- *submitted*

Order item

- *ordered*

Copy

- *ordered*

Publication pattern

- *in preparation*

Field 997

- *1 – ordered*

Options

You can submit all prepared orders simultaneously. Highlight the **Order** class and select the **Class / Submit and send** method. From the list, select the orders that you wish to submit and send.

If address of the department in which a copy of the serial will be located is different from the address of the department where you wish to receive the copy, the recipient department can be displayed on the order report instead of the first department. This type of report is enabled by a special parameter in the configuration file. The recipient library department ID must be entered into the appropriate subfield *997n – Note* in the following format: **< recipient_department_ID >*. If there are several notes in the field 997 (several subfields *997n*), you must enter the recipient department ID into the last subfield *997n*. For standing orders, where there can be several fields 997 for a copy, you must enter the recipient department ID into the last field 997.

What to do next

After having received the first issue of the serial subscribed to, accession the volume, edit the publication pattern and register the receipt of the issue.

3.2.8 Changing an order validity date

If, for a certain serial, the supplier extends the order validity date, you change, under the order item, the date to which the order is valid.

Procedure

1. In the **Order item** class, find and select the order item.
2. Select the **Object / Edit** method.
3. Change the date under "Order valid to".
4. Save the data.

3.2.9 Adding an item for supplement

When you receive a supplement, e.g. special issue, index, other supplements, which you wish to be processed separately in the holdings data (separate field

997), you add a new order item to the submitted order; as a result, an additional field 997 will be created.

Precondition

The order status must be *submitted*. The status of the list of unsolicited publications must be *entry closed*.

Procedure

1. Find and select either the order in the **Order** class or the list in the **List of unsolicited publications** class.
2. Select the item in the list of objects linked to the acquisition document.
3. Select the **Object / Copy item for supplement** method.
The **Search – Bibliographic record** window will open.
4. Find and select the bibliographic record for the serial supplement.

An item with the same apportionment of copies as the main item will be added to the order or the list of unsolicited publications. The price of the main item will not be copied to this additional item.

3.2.10 Linking an item to a field 997

You can link an order item to a field 997. You do this when a field 997 has already been entered for the serial in the database, and you wish to subsequently prepare an order for this serial.

When preparing an order, deselect the check box in the order item, under the "Create field 997" attribute, to disable the creation of a field 997. When submitting an order, fields 997 will not be created for this serial.

Precondition

The order item status must be *ordered*.

Procedure

1. Find and select either the order in the **Order** class or the list in the **List of unsolicited publications** class.
2. Select the item in the list of objects linked to the acquisition document.
3. Select the **Object / Link to the existing field 997** method.
The list of fields 997 will open.
4. Select the field 997.

The list of copies will open. Select the copy. The field 997 will be linked to the selected copy.

The list of copies will not open if:

- only one copy under the item is not linked to the field 997; if that is so, this copy will become linked to the field 997
- all copies under the item are already linked to the field 997; if that is so, a window will open asking if you wish a new copy under the item to be added for the selected field 997; to add a new copy, click

9.2 SUBMITTING AND SENDING A CLAIM

Edit the claim, e.g. enter the note relating to the claim and perform the control printout before submitting the claim.

The sending address is transferred from the database of partners; you can change it.

When submitting a claim, the current date will be automatically recorded as the submission date. Then either print out the claim or send it to the supplier by e-mail, depending on the selected sending method.

Procedure

1. In the **Claim for undelivered issues** class, find and select the claim.
In the **Advance** class or in the **Invoice** class, find and select the advance payment or the invoice for which you have prepared a claim.
2. Select the **Object / Submit and send** method (for claims for undelivered issues) or the **Object / Submit and send claim** method (for advance payments and invoices).

The **Overview and sending of created report** window will open, from where you can send a claim to predefined or changed destinations. In the *COBISS3 Basic Guidelines User Manual* you can find how to send a report (see chapter 4.5).

On claims for undelivered issues, items are arranged alphabetically by serial titles.

If you prepare claims for undelivered issues of a certain serial more than once, the number(s) and submission date(s) of the previous claim(s) and the data on undelivered issues claimed are recorded in the order item under the attribute "Previous claims". It depends on the parameter setting in the configuration file whether this data will be printed out on the claim or not.

Status after submitting and sending a claim

Claim for undelivered issues

- *submitted*

Advance or invoice

- *claim sent*

Options

You can simultaneously submit all prepared claims for undelivered issues. Highlight the **Claim for undelivered issues** class and select the **Class / Submit and send** method.

If address of the department in which a copy of the serial will be located is different from the address of the department where you wish to receive the copy, the recipient department can be displayed on the claim report instead of the first department (see chapter 3.2.7).

What to do next

When you receive the serial issue or the supplier's answer to your claim, close the claiming procedure.

12.1 COBISS3/ACQUISITIONS

Due to certain similarities between acquisition procedures of monographs and of serials, the following classes are common to and included in both segments, COBISS3/Acquisitions and COBISS3/Serials:

- Material
- Fund
- Entry
- Overpayment
- Counters
- Item template
- Copy
- Requested by
- Indirect cost

Data entry and maintenance are performed in the same way in both modules.

B REPORTS

The COBISS3/Reports module is designed for creating and printing different reports based on data entered to other modules of the COBISS3 software (COBISS3/Serials, COBISS3/Interlibrary Loan, etc.).

This appendix describes the procedures of creating and printing reports for serials, which are created and printed in the COBISS3/Reports module, and the procedure of deleting stored files containing reports. The report layout is predefined; however, you can change the content by changing the variable values and by entering parameters during the report creation procedure. A list of system variables for serials and a description of the procedure, which enables an individual institution to define its own variable values for serials, are also included in this appendix.

Business documents and other reports, which are created, printed or sent by e-mail in the COBISS3/Serials module, and reports for serials, which are created and printed in the COBISS3/Reports module, are described in separate appendices (including the parameters, which are considered when preparing these reports).

When a report is created, a notification about the job is sent to the e-mail address of a librarian who defined the job. Another notification is sent to the same e-mail address if the report could not be created as it failed to meet the conditions for creating a report or an error occurred during the creation of the report.

If the report was successfully created, you can, after you receive the notification about the job, find the saved file containing the report and send it to destinations (see appendix *B.1.3*).



Note:

Tasks that are repeated periodically (e.g. every day, every week, every month, etc.) always have the status *created* (and never get the status *completed*).

B.1.3 Finding saved files containing reports

You can find a saved file in the COBISS3/Reports module. The module is available from your browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Serials** folder and select the group that contains the definition of the report.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report you created and saved as an XML-file in a predefined folder and that you wish to print out or send by e-mail.
3. Select the **Creating reports / Browse stored reports** method.

The **Select report** window will open containing folders with stored reports. Under "Select folder" the name of the folder is displayed containing the saved file with the reports you created based on the selected definition.

4. In the selected folder, select the desired file with the created report. Its name will be transferred to "File name".
5. Click the **Open** button.

The **Overview and sending of created report** window will open, from where you can send the created report to predefined or changed destinations (the procedure is described in the *COBISS3 Basic Guidelines User Manual*; see chapter 4.5).

B.1.4 Deleting saved files containing reports

You can find the files you wish to delete in the COBISS3/Reports software module. The module is available from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Serials** folder and select the group that contains the definition of the report.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report you created and saved as an XML-file in a predefined folder and that you wish to delete.

3. Select the **Creating reports / Delete stored reports** method.

The **Select report** window will open containing folders with stored reports. Under "Select folder" the name of the folder is displayed containing the saved file with the reports you created based on the selected definition.

4. In the selected folder, select the desired file with the created report. Its name will be transferred to "File name".

If you select several files at the same time, the names of all the selected files with created reports will be transferred to "File name".

5. Click the **Delete** button.

A window will open with the question "Are you sure you wish to delete the selected files containing reports?".

6. To delete, click the **OK** button.