

**COBISS<sup>®</sup>**

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Co-operative Online Bibliographic System & Services

***COBISS3/ Serials***

***V6.0-00***

User Manual

Institute of Information Science, Maribor, Slovenia

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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corresponds with the COBISS3, V6.0-00 software, and is also valid for the future software versions until it is either withdrawn, or another electronic version is published.

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# PREFACE

COBISS3 is the name for the third generation of software, developed by IZUM for the needs of the COBISS system. The first generation of software was named ATLASS; this was followed by the second one which shared the name of the COBISS system (now called COBISS2), while the latest generation, developed on the basis of object technology, is called COBISS3.

With a new concept, new tools were included into the COBISS3 software development process, such as tools for object analysis, design, and implementation and configuration management.

One of the architectural characteristics of the COBISS3 software is the three-tier concept: user interface, business logic and database. All three layers are connected through the RMI object model (*Remote Method Invocation*); Oracle is used for databases.

The COBISS3 software is developed in Java, which is more than just a programming language, since it enables the application to work in different environments:

- user interface (Windows 98/Windows 7/ME/2000/XP/Vista, Linux, Mac)
- business logic (Windows 2000/XP, Linux)
- database (Windows 2000/XP, Linux)

The COBISS3 software consists of nine modules:

- COBISS3/Cataloguing
- COBISS3/Acquisitions
- COBISS3/Serials
- COBISS3/Electronic Resources
- COBISS3/Holdings
- COBISS3/Loan
- COBISS3/Interlibrary Loan
- COBISS3/Reports
- COBISS3/Application Administration

**COBISS3/Cataloguing** is the central module of the COBISS3 software; it supports shared cataloguing within the Co-Operative Online Bibliographic System and Services (COBISS). It enables the following procedures when

working with bibliographic and authority records in different databases: searching and viewing records, creating and editing records, downloading records from the COBIB database and different foreign databases, resolving duplicate records, resolving local bibliographic records and splitting authority records. Both cataloguing and working with authority records take place in a single cataloguing user interface.

**COBISS3/Acquisitions** is a module which enables libraries the automation of the following procedures for acquiring monographs: purchase (consisting of pre-order selection, order and prepayment of items ordered, receipt of items ordered and payment of items received), receipt and shipment of monographs based on exchange, receipt of legal deposit copies and gifts, keeping records of other types of library material acquisition, claims for undelivered and received material, received invoices and documents for prepayment, partner data maintenance, fund data maintenance and counter set-up.

**COBISS3/Serials** is a module which enables the automation of the following procedures for acquiring serials: purchase (consisting of pre-order selection, order, order cancellation, prepayment and payment of serials), receipt and shipment of serials based on exchange, legal deposit copy or gifts along with other types of library acquisition, maintenance of publication pattern data and performance of serials check-ins, sending publications in exchange and sending legal deposit material, claims for missing issues, prepayment documents and received invoices, partner data maintenance, fund data maintenance and counter set-up.

**COBISS3/Electronic Resources** is a module which enables libraries the automation of the following procedures for acquiring electronic resources: purchasing packages and licences for individual electronic resources, prepayment and payment of electronic resources, receipt of legal deposit of electronic publications, links to e-book loan portals, partner data maintenance and fund data maintenance as well as counter set-up.

**COBISS3/Holdings** is a module which enables the following actions: adding fields 996/997 and 998, entering and changing data in these fields, copying data to fields 996/997, changing the status in several fields 996/997 within the record, changing the data in fields 996/997 using accession numbers or loan numbers, sorting fields 996/997 within the record, making up a set, printing labels, accessioning monographs, de-accessioning missing monograph copies after inventory. Management of serial holdings data allows you to accession serials, create and edit publication patterns, perform serials check-in based on publication patterns, and also provides support with binding, unbinding and de-accessioning issues and volumes of serials. The module includes also the following procedures: creating parallel local records in the local database, transferring fields 996/997 from one bibliographic record to another, displaying records in the COMARC format, checking the loan status of copies, printing the list of recently received materials, setting up counters for adding accession numbers, running numbers and loan numbers, displaying the list of libraries as well as supplementing data on the material with multimedia content.

**COBISS3/Loan** is a module which enables libraries the automation of the following procedures: entering and editing data on library members, deleting data on library members, changing library membership card numbers and printing library membership card labels, lending materials for outside loan or

for reading room loan, renewing loan periods, changing due dates, returning material with the option of either selecting or not selecting the library member, reserving available and currently unavailable material, and printing lending forms. For serials, you can specify routing lists and record routing of individual issues of serials. In libraries in which loan is organized in separate departments it is possible to keep separate loan records by department, to put material on interdepartmental loan from the parent department to the host department, to lend that material further to members in the host department and search for material in the catalogue by departments. For the needs of loan systems, a note about the copy (item) can be added for individual copies (items) of material; for material on loan, temporary notes can be entered as well. In the local catalogue, you can perform searches for individual items of material, view bibliographic and holdings data and, if the item is not available, provide the information about who borrowed the material if it is not currently available. It is possible to use different criteria to search for data on library members, and then print out the search results as a list. Libraries that charge their members for specific services can also manage their price lists, record and settle debts, print invoices, cancel debt settlement, close out cash register and view cash register transactions. For members with delays in returning library material, libraries can create and print out overdue notices. Libraries can also change their own time parameters for loans, the opening days calendar, the settings for the electronic notification of library members; they can set the restricted number of material on loan, the restricted number of loan renewals and the membership validity period for individual member category, and change the URL address with contact details and notifications related to the My library service in COBISS/OPAC.

**COBISS3/Interlibrary Loan** is a module which includes the following procedures: recording customer requests for ILL, reservation of home library materials, ordering materials from suppliers or the library's closed stacks, recording the receipt of material to the customer, recording the receipt of materials from suppliers or the library's closed stacks, delivery of materials to the customer, return of materials from the customer and return of materials to the supplier or the library's closed stacks. It also includes preparation and submission of invoices for legal entities, i.e. partners who order or pay for the services provided, preparation of messages for customers and suppliers, partner data maintenance and price lists as well as counter set-up.

**COBISS3/Reports** is a module which allows you to create multiple types of reports, such as different forms, business documents, statistics, etc. Reports are created on the basis of data from all the COBISS3 software modules and can be printed out or sent by e-mail when they are ready. The standard-form reports for each module are designed at IZUM.

**COBISS3/Application Administration** is a module which allows libraries to maintain data on their home library and partners and to view data on system users.

The contents of the manual correspond to the currently valid version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published. The contents of the manual are saved on the **Training** portal and available by selecting *E-manuals*,

you can also access the contents directly by going to the **Help** menu within the COBISS3 software.

For better understanding of software functioning, a glossary of the used expressions is included in the COBISS3 Basic Guidelines User Manual.

Further information and help is available at the seat of the National COBISS Centre in your country (contact details published on the last page of the manual).

### **4.3.1 Issuing a legal deposit receipt confirmation**

You can issue a legal deposit receipt confirmation for serials for a specified period to the liable institution.

The Legal deposit receipt confirmation – serials report can be created in the COBISS3/Reports module. Creating and printing are described in Appendix *B.1.1*. When creating a report on the legal deposit receipt confirmation for serials, you must specify the period for which you wish to issue the report.



## 11.3 SETTING UP COUNTERS

Acquisition documents are numbered automatically. The report format for counters is defined automatically. First two characters indicating the year are followed by "-", and the last five characters that follow indicate the current number of a document.



Note:

*You cannot change the report format for counters.*

After the COBISS3 software is installed, all values of counters are zero, consequently, the initial values must be set. After that, each time you select the **Counters** object, the last values occupied are indicated under attributes. At the beginning of the year, you usually set the values of counters to zero.



Example:

In the beginning of 2008, you enter the initial value of an individual counter as follows: *08-00000*.

Counters for the following documents are stored in the **Counters** class:

- COBISS3/Acquisitions module: Order, Order cancellation, Delivery note, Advance, Invoice, Indirect cost invoice, List of material received by exchange, List of legal deposit material, Gift list, List of other receipts, Claim for received material, Claim for undelivered material, Invoice claim, Exchange-based order received, Shipment of exchange material and Shipment of legal deposit material
- COBISS3/Serials module: Order, List of unsolicited publications, Advance, Invoice, Indirect cost invoice, Claim for undelivered issues, Invoice claim, Sample copy request, Cancellation, Shipment of exchange publications, Shipment of legal deposit material
- COBISS3/Electronic resources: Invoice, Advance



Note:

*One counter is used for both, invoices and indirect cost invoices.*

*In the COBISS3/Acquisitions and COBISS3/Serials modules, however, it is possible to use either one counter or two separate counters for invoices and indirect cost invoices, depending on the parameter setting in the library's configuration file.*

*One counter in both modules is used for invoice claims.*

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### 11.3.1 Using available numbers

If you do not save the data when entering acquisition documents, this leads to gaps in the sequence of numbers. You can fill in these gaps by setting the value of the counter to the last number occupied that precedes the first number available. The report format must remain the same!

#### *Procedure*

1. In the **Counters** class, find and select the counters.
2. Select the **Object / Edit** method.
3. Enter the initial value of the counter.



**Example:**

The last order number occupied is *07-00045*. In the database, there are some available numbers preceding this last order number, the lowest such number being *07-00012*. If you wish to use the still available numbers that precede the last order number, enter the number *07-00011* under "Order".

4. Save the data.



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