

COBISS[®]

Co-operative Online Bibliographic System & Services

COBISS3/ Serials

V6.1-00

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corresponds with the COBISS3, V6.1-00 software, and is also valid for the future software versions until it is either withdrawn, or another electronic version is published.

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for reading room loan, renewing loan periods, changing due dates, returning material with or without the option of selecting library members, reserving available and currently unavailable material, returning material with restriction, recording the loss of material, printing lending forms and transferring data from the reference students database. 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, to return material in any 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 the contents of overdue notice forms, 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. It is now also possible for libraries to perform automated loan procedures in the mobile library and use the RFID self-checkout and RFID reader at the lending desk.

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).

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

**Status after
submitting and
sending an order**

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 the **Yes** button

3.2.11 Ordering a monographic series

You can prepare a monographic series order in the COBISS3/Serials module whereas you order, receive and pay single monographic series items in the COBISS3/Acquisitions module.

When creating a monographic series order, you must, under the order item, select *monographic series order* as the order type. Apart from that, the procedure for ordering a monographic series does not differ from the procedures for preparing standing and annual orders of serials.

When preparing an order of single monographic series items, the relationship with the monographic series order is established in the COBISS3/Acquisitions module; as a result, in the COBISS3/Serials, an overview of procedures for ordering, receiving and paying single items, which are performed in the COBISS3/Acquisitions, is possible.

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** or in the **Invoice** class, find and select the advance payment or the invoice for which you have prepared a claim.

You can find prepared claims also in the **Pending documents** class.

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.