COBISS3 Application Administration

V6.24-00

User Manual

United Nations
Educational, Scientific and
Cultural Organization

Regional Centre for
Library Information Systems and
Current Research Information Systems
Regionalni center za knjižnične
informacijske sisteme in informacijske
sisteme o raziskovalni dejavnosti
IZUM

The manual includes all updates from the first printed version of the manual published in February 1999 onwards. Its content corresponds with the COBISS3, V 6.24-00 software, and is also valid for all future software versions until it is either withdrawn, or another electronic version is published.

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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 as well as displaying the list of libraries, updating material data with multimedia, and checking and selecting discarded library material.

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, 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 lending forms and 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. 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).

ABOUT THE MANUAL

Writing conventions used in this manual:

1. Text in **bold** indicates the names of windows, tabs and buttons.

> Examples:
>
> The **Order** editor opens.
> The **Order cancellation** window opens.
> Click on the **Details** tab.
> Click the **Select** button.

2. The names of menus and methods in the menu bar are printed in **bold**. The name of the menu is followed by the name of the method. Names of classes are also indicated in **bold**.

> Examples:
>
> Select the **Order** class.
> Select the **Class / New Object** method.

3. Those parts of the text which have to be emphasised are written in ***bold italics***.

> Example:
>
> The ***destination*** can be an e-mail address or a printer.

4. Icons are displayed graphically.

> Example:
>
> Click on the icon .

5. Names of attributes, parameters and drop-down lists are indicated with double inverted commas.

Example:

Under "Hit list format", select the format, in which you wish the search results to be displayed.

6. Attribute values are displayed in *italics*.

Example:

If a customer would like to buy a copy of an article, select the value *purchase* under "Service type", the value *article* under "Type of material" and *copy* under "Medium type".

7. The keys on the keyboard are enclosed in angle brackets.

Example:

<Enter>, <Tab>, <Shift>, <Ctrl>, <Alt>, <Esc>.

8. A plus sign (+) between two key names indicates that both keys have to be pressed simultaneously.

Example:

<Ctrl> + <P> require you to press <Ctrl> and <P> at the same time. Press <Ctrl> first and hold it down, then press <P>.

1 INTRODUCTION

To have access to the COBISS3/Application Administration software module, you must obtain the privilege *ADM – Access to COBISS3/Application Administration, and data viewing and printing*.

Entering and editing home library data

Under home library data, enter data:

- that you use in the COBISS3 software
- that you use to update the COLIB database (these data is not used in the COBISS3 software)

The data that you use in the COBISS3 software is saved in the COBISS3 environment, some of this data is saved also to the COLIB database; the data that you use to update the COLIB database, however, is saved only to the COLIB database.

Some data in the home library is already entered (transferred from the COLIB database). Before you start working in the individual COBISS3 software module, edit or update it if necessary. Enter also the more detailed data, which is taken into account when performing certain procedures in the individual modules, and data on contact persons or contact departments. For every contact person or contact department, you can define whether the name and address will be displayed as the sender's address on the documents in the individual COBISS3 software modules. Define one contact person or contact department for each module only. If you do not define them, only the data on the head office address of the home library will be displayed.

Entering and editing partner data

During the process of acquisition of monographs and serials and in the case of interlibrary loans, you have to deal with partners, such as libraries, publishing houses, services, as well as other institutions and individuals.

Enter the general data on the partner first, i.e. name, head office address, VAT ID number or tax number, etc. If your partner is one of the libraries included in the COLIB database, the general data can also be downloaded from that database. If the partner is already included in the library members database, you can download the data from that database as well. The partners can have different roles in the process of acquisition of serials and monographs and in interlibrary loan (e.g. a partner can be both the supplier of materials for interlibrary loan and its customer, and can be the supplier of serials and monographs in acquisition, as well as the financier, a donor and a sender of legal deposit copies, etc). Hence, you can specify several roles for each partner. Next, enter the data on the contact persons and contact departments. For each contact you can define whether the name and address of the contact will be used and displayed as the recipient's address on the documents in the individual COBISS3 software modules. For each module, you can specify several contact persons and departments. If you do not define them, only the data on the head office address will be displayed.

Editing user data

The data on the selected system user or on all system users can be reconciled with the data in the Central Register of Users (CRU). Also, you can set user settings back to default values for the selected user.

Appendices

Appendix A contains descriptions of the address structure within reports.

2 HOME LIBRARY

Upon installation of the COBISS3 software, the object will already be created in the **Home library** class (home library data is downloaded from the COLIB database) within the COBISS3/Application Administration software module. Because the home library data will be displayed as the sender's address on all documents sent to the library's members and partners, enter the data on the home library before you start working with the other modules.

To enter and edit the home library data, you will require the following privilege: *ADM_PARTNER – Partner data maintenance*.

Subchapters:

- Entering home library data
- Searching for library data in the COLIB database
- Displaying library data in the COLIB database

2.1 ENTERING HOME LIBRARY DATA

Data on the home library is entered in the **Home library** editor. Under data on the home library, enter the data:

- that is used in the COBISS3 software
- that is used to update the COLIB database (this data is not used in the COBISS3 software)

The data that is used in the COBISS3 software is saved in the COBISS3 environment, some of the data is saved also to the COLIB database; the data that is used to update the COLIB database, however, is only saved to the COLIB database.

In the COBISS3 software, use the data that you enter under **General** and **Details** tabs in the **Home library** editor. Under the **General** tab, enter the ***general data*** on the home library (library name, library address, tax number or VAT ID number, etc.). Under the **Details** tab, enter the **detailed data** on the home library, ***data on the contact persons*** and the ***contact departments***, ***information on reservation processing spots***, and in libraries where loan is organised by departments, enter also the ***data on the lending departments***. If the library allows the members to select the reservation type, also specify the conditions for priority reservations in the home library data.

Note:

If parameters for fiscal cash registers are included in the library's initialization file, enter also the **data on business premises** *under the* ***Details*** *tab. Entering the data will be described in the COBISS3/Loan User Manual (see chapter* 7.10.1*).*

The detailed data will be taken into account when performing certain procedures in the individual COBISS3 software module; data on the contact persons and data on the contact departments, together with certain general data, will be displayed as the sender's address on the documents, prepared to be sent by mail or e-mail (documents are prepared in the individual COBISS3 software modules for partners that have different roles, and for members).

The data on the home library that is used **exclusively** for updating the COLIB database is entered in the **Home library** editor under the **Data for COLIB (1)** and **Data for COLIB (2)** tabs.

Note:

The home library data under the ***Data for COLIB (1)*** *and* ***Data for COLIB (2)*** *tabs is used exclusively for updating the COLIB database and is* **not used** *in the COBISS3 software.*

Certain general home library data is already entered: library name, head office address, telephone and fax number, e-mail address, homepage URL, web address, where the conditions for ordering material and the price list for interlibrary loan services are published, VAT ID number or tax number, library acronym, and library code, i.e. library identification number in the COBISS system. The data is downloaded from the COLIB database. Before you start working with the individual COBISS3 software module, edit and add the data if necessary. Enter also the detailed data, which will be taken into account when performing certain procedures within the individual modules, and add the data on the contact persons and the contact departments. For every contact person or contact department, you can define whether the name and address will be displayed as the sender's address on the documents in the individual COBISS3 software modules. Define one contact person or contact department for each module only. If you do not define them, only the data on the head office address of the home library will be displayed on the document.

Procedure

1. In the **Home library** class, find and select the object.[1]
2. Select the **Object / Edit** method.

   The **Home library/General** editor will open.
3. Edit or add the general data on the home library (see chapter *2.1.1*).
4. Enter the detailed data (see chapter *2.1.2*).
5. Enter the data on contacts (see chapter *2.1.3*).
6. Enter the data on the lending departments if loan is organised by departments in the library (see chapter *2.1.4*).
7. Enter the data on business premises (see *COBISS3/Loan User Manual*, chapter *7.10.1*).
8. Enter the data on the reservation processing spots (see *COBISS3/Loan User Manual*, chapter *4.18.1.1*).
9. Enter the data for updating the COLIB database (see chapter *2.1.5*)
10. Define the conditions for priority reservations of material (see *COBISS3/Loan User Manual*, chapter *4.19.1*)
11. Save the data.

In the **Home library** and **Partner** classes, the data under **General** and **Details** tabs will be saved; in the COLIB database, the data under **Data for COLIB (1)** and **Data for COLIB (2)**, and also the head office address, homepage URL and VAT ID number or tax number (from the **General** tab), and the web address where the conditions for ordering material and the price list for interlibrary loan services are published (from the **Details** tab) will be saved.

[1] Because there is only one object saved in the **Home library** class, it will be loaded to the workspace when you start the search.

2.1.1 Entering general data

To enter general data on your home library, use the **Home library/General** editor.

Certain general data on the home library is already entered: library name, head office address, telephone and fax number, e-mail address, homepage URL, VAT ID number or tax number, library acronym, and library code, i.e. library identification number in the COBISS system. This data is downloaded from the COLIB database, which you can edit or update if necessary.

Procedure

1. Under "Symbol", the library acronym is entered, which uniquely identifies the home library and which will be used for searching for objects by key. The data cannot be changed.
2. Under “Name”, the library name is entered. Edit the data if necessary and enter also the second name of the home library.

   If you wish for the data on English reports to be displayed in English, enter the English names of the home library into the appropriate fields.

> Example:
>
> In the University of Maribor Library, enter *Univerzitetna knjižnica Maribor* under "Name".
>
> If you wish the name of the parent institution, i.e. University of Maribor, to also be displayed on the documents that will be sent from the University of Maribor Library, move the value *University of Maribor Library*, which is entered under “Name”, to “Second name”, and enter *University of Maribor* under “Name”.

   If you wish for the data on English reports to be displayed in English, you can enter the English names of the home library into the appropriate fields.

> Example:
>
> If you wish for the order that will be sent from the University of Maribor Library to a supplier abroad to display the name of the library in English, enter *University of Maribor* under "Name – English" and *University Library (UKM)* under "Second name – English".

3. Under "Library type", the appropriate value, which cannot be changed, is entered.
4. Edit and add the data on the head office of the home library: street and number, postcode, city and country. It is mandatory to enter this data.
5. Edit and add the telephone number, fax number, e-mail address and the home library's homepage.

Note:

*When a library changes its e-mail address, telephone number or fax number, you need to change the data under the general data on the home library (**General** tab) and also under data on the library department (**Data for COLIB (2)** tab), under which the library data is entered. Based on this data, the so called distribution lists for notifying libraries are prepared daily by IZUM.*

6. Under "Ariel IP address", enter the IP address of the home library's computer, if you want the suppliers to send you the ordered material using Ariel software. This information will be displayed on the order for the supplier for interlibrary loan.
7. Under "Library code", the library code is entered. The data cannot be changed.

Note:

The library code allows you to send interlibrary loan requests to other libraries within the COBISS system; these requests are then automatically saved to the libraries' ILL request database.

8. If your home library is identified for VAT purposes, tick the "Identif. for VAT purpose" check box.
9. Under "VAT ID No./Tax No.", the tax number or VAT ID number (i.e. the tax number with the prefix SI) is entered.

Note:

If a library is liable to VAT, the "Identif. for VAT purpose" check box must be ticked, and a VAT identification number must be entered under "VAT ID No./Tax No."

The data (i.e. the VAT ID number or the tax number) will be displayed on the reports, intended for your partners, on which the taxable entity is stated.

10. You can also enter the transaction account number or the sub-account number and the branch of the bank or the competent authority (e.g. Public Payments Administration of the Republic of Slovenia), where your home library has an account or sub-account, and the type of payment card and the card number. The data is for information purposes only.
11. If your home library is a part of an organisation, click the **Superior partner** button. The **Search – Partner** search window will open. Find and select your superior partner.

2.1.2 Entering detailed data

Use the **Home library/Details** editor to enter the data, which will be taken into account as default values when performing certain procedures in the COBISS3/Acquisitions and COBISS3/Interlibrary Loan software modules.

Procedure

1. When the home library acts as the supplier for interlibrary loan, under "Delivery time (days)" enter the number of days it normally takes to deliver the material to the customer. The data is not mandatory. Enter the data if you want it to be used to calculate the acceptable delivery date for the customer when the request for interlibrary loan is recorded.
2. The **Copyright compliance** button represents the default copyright statement on the order to inform the interlibrary loan supplier about the intended use of the ordered document copies. If you wish to change the wording, click the **Copyright compliance** button and use the **Copyright compliance** window to enter the desired text in your native language (e.g. Slovene) and in English. The text will then be offered as the default value when you prepare an order for the interlibrary loan supplier.
3. Under "Ordering terms (COBISS+)", enter the web address, where the conditions for ordering material and the price list for interlibrary loan services are published. The library members can access the website through COBISS+, if their library offers interlibrary loan services through COBISS+ (within "My library", select the link Ordering of material and then the link Terms and conditions for ordering).

> Tip:
>
> It is recommended that any library, offering their library members the option of ordering material electronically, also includes a form for ordering materials through COBISS+ on their website. The orders, submitted by the library members in such a way, will automatically be saved to the library database, where the incoming ILL requests are stored.

4. Under “ILL restriction (COBISS+)”, enter the maximum number of pending ILL requests that should not be exceeded so that the library member can still submit an ILL request via COBISS+. Once the number is reached, a member can still place an order for the material in the library, and a librarian can decide whether the new ILL request will be accepted or rejected.

   The restriction is applied at the level of the library and for all member categories.
5. Under "Deductible input VAT (%)", enter the percentage value of the deductible input VAT, as instructed by your accounting department. The value will be displayed as the default value when the invoice is entered.

2.1.3 Entering data on contacts

For your home library, you can define the following:

- a contact person
- a contact department

For every contact person or contact department you can define whether their name and contact details (address, telephone number, fax number, e-mail address) will be displayed as the sender's address on the documents, which are ready to be sent by mail or e-mail (documents are prepared in the individual COBISS3 software modules for partners, which have different roles, and for members). If you do not specify them, only the data on the head office address of the home library will be displayed.

> Note:
>
> *For the home library, you can only define one contact person or one contact department that will be displayed as the sender's address on the reports, which are prepared and sent from an individual software module.*

2.1.3.1 Entering data on the contact person

Procedure

1. In the **Home library/Details** editor or the **Partners/Roles and contacts** editor, click the **New object** button.

   The **List** window will open. Use it to select the desired value.

2. Select *Contact person* and click the **OK** button.

   The **Contact person** editor will open.

3. Enter the name and surname of the contact person.
4. Under "Title", enter the form of address for the person (e.g. Mr., Mrs., Miss) or the academic title (e.g. Dr., mag., etc.). The form of address will be displayed in front of the contact person's name and surname, if you define that the data on the contact person will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the documents in the individual COBISS3 software modules.
5. Under "Professional title", enter the word or phrase describing the level of education (graduate or post-graduate). The professional title will be displayed next to the name and surname of the contact person, if you define that the data on the contact person will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the reports in the individual COBISS3 software modules.
6. Under "Sphere of activity", enter the field in which the contact person is working.
7. Enter the department, in which the contact person is working. The department will be displayed below the name and surname of the contact person, if you define that the data on the contact person will be used and

displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the reports in the individual COBISS3 software modules.

8. Define the software module(s), in which the data on the contact person will be used when preparing and sending reports.

   Tick the "Address on forms (ACQ)" check box if you wish that the name and surname as well as address of the contact person will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the documents in the COBISS3/Acquisitions software module.

   Tick the "Address on forms (S)" check box if you wish that the name and surname as well as address of the contact person will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the documents in the COBISS3/Serials software module.

   Tick the "Address on forms (ILL)" check box if you wish that the name and surname as well as address of the contact person will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the documents in the COBISS3/Interlibrary Loan software module.

9. Under "Form of communication" define the most commonly used form of communication with the contact person. The value will be suggested which you selected from the data on the partner's head office. This data is used to define the sending method for reports sent to the contact person. For the contact person of the home library, this data does not have to be defined.

10. Enter the information about the address: street and number or the P.O.B. number, post code, city, country, telephone number, fax number as well as the e-mail address. Most of this data is transferred from the **Home library** and **Partner** class. Check the transferred data and change it only if the contact person's address is different to that of the home library or the partner.

    The data will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the reports in the individual COBISS3 software modules.

Note:

Only enter the P.O. box number in the field labelled "P.O.B.". Do not include the P.O. box name (e.g. pp, PP, P.P., POB, *etc.) because the name is already a part of the generated report and will be displayed on the reports as a default value.*

Note:

If you enter the data on the street and number as well as the P.O. box of the recipient, a warning message will appear when you try to save the changes. The software does not allow you to save the data, until you delete one of the values (either "Street and No." or "P.O.B.").

11. Tick the "Non-active" check box, if you do not intend to use the data on the contact person any more.
12. Click the **Note** button. A window will open. Use it to enter your notes and click the **OK** button.
13. Save the data.

When you save the data, the contact person will receive a symbol, which consists of the home library symbol or the partner symbol, the "/" sign and the current number of the contact person or the contact department at the home library or partner. The identification data on the contact person will be displayed in a list of contact persons and contact departments of the selected object in the **Home library/Details** editor or the **Partner/Roles and contacts** editor.

2.1.3.2 Entering data on the contact department

Procedure

1. In the **Home library/Details** editor or the **Partners/Roles and contacts** editor, click the **New object** button.

   The **List** window will open. Use it to select the desired value.
2. Select *Contact department* and click the **OK** button.

   The **Contact department** editor will open.
3. Enter the name of the department. You can also enter the English name of the department in a separate field, if you wish that the name will be displayed in English as a part of the sender's address on the reports in English language.
4. Define the software module(s), in which the data on the contact department will be used when preparing and sending reports.

   Tick the "Address on forms (ACQ)" check box if you wish that the name and address of the contact department will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the documents in the COBISS3/Acquisitions software module.

   Tick the "Address on forms (S)" check box if you wish that the name and address of the contact department will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the documents in the COBISS3/Serials software module.

   Tick the "Address on forms (ILL)" check box if you wish that the name and address of the contact department will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the documents in the COBISS3/Interlibrary Loan software module.
5. Under "Form of communication" define the most commonly used form of communication with the contact department. The value will be suggested which you selected from the data on the partner's head office. This data is used to define the sending method for reports sent to the contact

department. For the contact department of the home library, this data does not have to be defined.

6. Enter the information about the address: street and number or the P.O.B. number, post code, city, country, telephone number, fax number as well as the e-mail address. Most of this data is transferred from the **Home library** and **Partner** class. Check the transferred data and change it only if the contact department's address is different to that of the home library or the partner.

   The data will be used and displayed as the sender's address (i.e. home library) or recipient's address (i.e. partner) on the documents in the individual COBISS3 software modules.

> Note:
>
> *Similar to the aforementioned example, only enter the P.O. box number in the field labelled "P.O.B.". Do not include the P.O. box name (e.g.* pp, PP, P.P., POB*, etc.) because the name is already a part of the generated report and will be displayed on the reports as a default value.*

> Note:
>
> *If you enter the data on the street and number as well as the P.O. box of the recipient, a warning message will appear if you try to save the changes. The software does not allow you to save the data, until you delete one of the values (either "Street and No." or "P.O.B").*

7. Tick the "Non-active" check box, if you do not intend to use the data on the contact department any more.

8. Under "Locations", enter the codes from the local code list CODE 84 for the individual department or organisational unit of the library, which is entered as the contact department for your home library.

   The data is entered in the case of libraries with several segmented departments and organisational units, which all receive serials. For every contact department, define one or several locations from the CODE 84 code list, which belong to the selected contact department. You can add one or several codes, but make sure to separate them with a comma (",").

Example:

The CODE 84 code list in the *Maribor Library* (Mariborska knjižnica) includes the following values:
/OK/ "Osrednja knji<vz>nica#01"
/OKi/ "Osrednja knji<vz>nica – inf. sl.#01"
/OKS/ "Osrednja knji<vz>nica – skupne sl.#01"

The address (i.e. street and number, post code, city) is identical for all three locations.

When you enter the contact department for *Mariborska knjižnica*, enter *Osrednja knjižnica* under "Name", and *OK*, *OKi*, *OKS* under "Location".

Do ***not*** enter the data on the location of the contact department for partners.

9. Click the **Note** button. A window will open. Use it to enter your notes and click the **OK** button.
10. Save the data.

When you save the data, the contact department will receive a symbol, which consists of the home library symbol or the partner symbol, the "/" sign and the current number of the contact department or the contact person at the home library or partner. The identification data on the contact department will be displayed in a list of contact persons and departments of the selected object in the **Home library/Details** editor or the **Partner/Roles and contacts** editor.

2.1.4 Entering data on the lending department

In libraries with departments you can enter data on the lending departments in the **Home library/Details** editor. Enter all the departments where the material can be borrowed. Enter also the departments that do not have automated loan. Mark these departments accordingly. You can lend the material to these departments by interdepartmental loan, but you cannot enter the loan of material in these departments or the interdepartmental loan from these departments.

Precondition

The lending department that you wish to enter under your home library data must be entered in the local code list with the CODE 301 (*Departments*) designation.

Procedure

1. In the **Home library/Details** editor click the **Lending departments** tab and then the **New object** button.

   The **Department/General** editor will open where you will enter the data on the lending department.
2. Under "Department", enter two digit department ID or select it from the code list.
3. Under "Expand" enter the expanded name of the department.

4. Enter the data on department address: street and house number, postcode, city, municipality of head office and country.
5. Under "Head of organisational unit", enter the name and surname of the head of organisational unit. The data is mandatory.
6. Enter the phone number and the fax number, department's e-mail address and the name and surname of the contact person.
7. Tick the "Automated loan" checkbox, if the COBIS3/Loan segment is used in the department.

> Note:
>
> *If you leave the "Automated loan" checkbox empty, you will not be able to log in to the selected department.*

8. Click the **Note** button. A window will open where you can enter notes about the department. You can enter several notes; the date of entry and the username of the user who entered the note are recorded automatically.

9. Under "Sublocations", one or more sublocations that belong to that department are displayed. Previously you defined, which sublocations belong to a particular department in the *Sublocation* local code list.

> Note:
>
> *The link between the sublocation and the department in the* Sublocation *local code list affects the department where the loan of the copy in the specific sublocation can be registered. In a specific department it is possible to register only the loan of a copy that has a sublocation of that department in its call number (element l of subfield 996/997d) or the temporary location (element E of subfield 996/997e).*

10. Under "Date of last visit", the date of the last visit is displayed regardless of the library department where the visit was recorded.
11. Under "E-mail for copies of e-notifi.", enter the e-mail address to which you wish to receive copies of e-notifications. If this data is not entered, copies of e-notifications for this department will be sent to the e-mail address, entered under home library in the contact details and information for COBISS+.
12. Under “E-mail address for reply (e-mail notifications)”, enter the e-mail address that is displayed in e-notifications for users and to which users can send their replies. If this data is not entered, e-notifications from that department will contain the e-mail address, entered under home library in the contact details and information for COBISS+.
13. Under “Number of mobile libraries”, enter the number of mobile libraries. If a library has a mobile library department, it usually has only one; thus, enter number 1 under department data where mobile library data is entered.
14. If the option is activated for the library, one or more superior partners can be specified for the department (see chapter *2.1.4.1*).

15. In the **Department/Info** editor, the rest of the data, which is automatically entered and cannot be changed, is available:
    - IDs of library departments in which at least one transaction has been recorded for the department ("Activity in departments")
    - the number of copies currently on loan at the department ("No. of copies on loan (LOAN))
    - the number of visits of the department in the current year ("No. of visits a year (LOAN)"); every transaction of material in different departments or several transactions within the same department on the same day is considered as one transaction
    - the username of the user, who entered the data on the lending department ("Entered by")
    - date and time of entering data on the lending department into the database ("Entered")
    - the username of the user who last modified the data on the lending department ("Modified by")
    - date and time of the last modification of the data on the lending department in the database ("Modified")
    - under "Details by department", the data related to activity in specific departments is displayed (department ID, date of last visit, No. of copies on loan)

16. Save the data.

Once the data is entered, you must refresh the settings first (the procedure is described in the COBISS3 Basic Guidelines User Manual, chapter *5.12*). Afterwards, at the **Training** portal, the local application administrator must add the department to the list of lending departments for the usernames of the users who do not have access to all the departments and who will be able to log only in to this department. For users who have access to all the departments, the new department is added to the selected departments automatically.

Users will be able to log in to the system after they re-log in to the COBISS3 software.

Note:

In the configuration file, you can set up a parameter (upon the library's request) that allows a library to define one or more superior partners to an individual department (see chapter 2.1.4.1). A library can decide for this option if the library department is also a part of an organization and if the library wishes for the department data and data on the department's superior partner to be taken into account as the sender's address in documents, created in the COBISS3/Interlibrary loan software module. If a library turns on this option, two more data, shown in the ***Department/Info*** *editor, the browser in the list of attributes and in the search window in the default hit list format will be automatically transferred: under "Total units ordered (ILL)", data on the number of items that are currently ordered through interlibrary loan under the selected department is available, and under "total units on loan (ILL)", data* *on the number of items from the selected department that are currently borrowed through interlibrary loan is available.*

2.1.4.1 Defining partners that are superior to the lending department

If a home library department is also a part of an organization, define a superior partner to that department. A department can have several superior partners (if it is a part of several organizations). Also, an individual partner can be a superior partner to several departments.

Examples:

The *Faculty of Management and Faculty of Education Koper* department of the University of Primorska Library operates as a joint library of the two faculties of the University of Primorska: Faculty of Management and Faculty of Education. For this reason, two superior partners (both faculties) will be defined to this department by the University library.

The *UP ZRS Library* department of the University of Primorska is an infrastructural organization unit of the University of Primorska, Science and Research Centre. For this reason, a superior partner, which is the Science and Research Centre, will be defined by the University library to this department. As the *UP ZRS Library* also has a dislocated unit (Institute for Mediterranean Heritage, SRC), which is also one of the University library departments, a superior partner (the Science and Research Centre) will be defined to this department by the library.

Precondition

The library has departments. In the configuration file, a parameter that allows you to link the selected department with one or more partners, which are entered to the partner database, is set up.

Procedure

1. To define a superior partner, click the **Add** button in the **Department/General** editor.

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

2. Find partners that you wish to link the selected department to.

   In the list of found objects, you can highlight several partners and transfer them to the list of partners that are superior to the selected department. In the list of superior partners, identification data on the selected partners – symbol, name, and second name – will be displayed.

Data on the department and the department's superior partner can be taken into account as the sender's address in documents, created in the COBISS3/Interlibrary Loan software module. The procedure of adding data on a specific department to the ILL requests is described in the *COBISS3/Interlibrary Loan* User Manual (see chapter *2.1.6*).

2.1.5 Entering data for updating the COLIB database

COLIB is a shared database that contains data on libraries within the COBISS system. The database is administrated by IZUM; the COBISS3 software enables transferring the relevant data on the home library into the COLIB database.

You can enter data on the home library for updating the COLIB database in the **Home library** editor under the **Data for COLIB (1)** and **Data for COLIB (2)** tabs.

Under the **Data for COLIB (1)** tab, you can enter data on:

- the responsible person (i.e. principal, director or library head), his/her academic title as well as the name and surname of the responsible person, his/her e-mail address, telephone number and fax number (you can enter the values in the **Contact person** editor, which will open after you click the **Principle**, **director** or **library head** button); the data on the contact person is mandatory; you must enter at least the name and surname of the responsible person, his/her e-mail address and telephone number
- the COBISS contact person, his/her academic title as well as the name and surname of the COBISS contact person, post or department, e-mail address and telephone number or fax number (you can enter the values on the **Contact person** editor, which will open after you click the **COBISS contact person** button); data on the COBISS contact person is mandatory; at least a name and surname of the person, his/her e-mail address and telephone number must be entered
- the other persons in charge (e.g. department heads), their academic title as well as the name and surname of the responsible person, his/her post or department, e-mail address, telephone number and fax number (values are entered in the **Contact person** editor, which will open after you click the **New object** button under the **Other persons in charge** tab); data on the other persons in charge of COBISS is not mandatory; if you decide to enter the data, at least the name and surname of these persons must be entered
- for interlibrary loan, the academic title as well as the name and surname of the ILL contact person, his/her post or department, e-mail address as well as telephone number and fax number (values are entered in the **Contact person** editor, which will open after you click the **New object** button under the **ILL data** tab); none if this data is mandatory

Note:

*When a library changes the ILL data (e.g. e-mail address or telephone number), you must change the data under the ILL contact data, which is used in the COBISS3 software (**Details** tab), and also under ILL data that is used for updating the COLIB database (**Data for COLIB (1)** tab). If a library changes its e-mail address, a notification must be sent to IZUM.*

Under the **Data for COLIB (2)** tab, enter:

- data on the material availability and accessibility of user services (values under "accessibility of services")
- data on library facilities and employees (values under "Net usable area in m^2", "Number of reading room seats", "Number of employees")
- data on the library's opening times for users and contact details of the library and its departments (i.e. organizational units, professional and administrative services, etc.); enter values in the **Contact department** editor, which will open after you click the **New object** button under the **Departments/opening times** tab)
- contact details of the library and its lending departments for the needs of the COBISS+ software and the mCOBISS application (enter values in the **Departments (COBISS+, mCOBISS)** editor, which will open after you click the **New object** button under the **Departments (COBISS+, mCOBISS)** tab.

2.1.5.1 Entering contact details of the library and its departments as well as data on the library's opening times

Contact details of the library and its departments (i.e. organizational units, professional and administrative services, etc.) and data on the library's opening times for users are entered in the **Home library** editor under the **Data for COLIB (2)/Departments/opening times** tab.

When you enter data on the new department, you must enter the name of the department and also at least its telephone number and e-mail address (for saving department contact details) or the opening times in days and hours (for saving data on the opening times of the department for users) or you will not be able to save the data.

In every library, at least one department, where you maintain library contact details (library's e-mail address, telephone number and fax number) and data on the library's opening times for users (opening times in days and hours as well as notes), is entered under department data that we use for updating the COLIB database (**Data for COLIB (2)/Departments/opening times** tab. If data on several departments are entered for the library, the library contact details are **always** maintained under the department that is placed first on the list of departments.

Note:

*Data on the department that is placed first on the list of departments (**Data for COLIB (2)/Departments/Opening times** tab) cannot be deleted!*

Note:

*When a library changes its e-mail address, telephone number or fax number, the data must be changed also under general home library data (**General** tab), under the library department data (**Data for COLIB (2)/Departments/opening times** tab), where the library data is entered (i.e. the first department in the list of departments). If loan is not organized by departments in a library, the data must also be changed under the data where contact details of the library for the needs of the COBISS+ software and the mCOBISS application are entered (**Data for COLIB (2)/Departments (COBISS+, mCOBISS)** tab). Based on this data, the (so- called) distribution lists for library notifications are prepared daily by IZUM.*

Note:

For the department, you can enter several telephone numbers, FAX numbers and e-mail addresses. The instructions on how to do this are in the COBISS3 Basic Guidelines User Manual, *see chapter* 4.2.1.3.

Note:

The opening times of the library and its departments are entered separately by days and hours, and you can also enter the note. The data is linked within the COLIB database.

Example:

In the **Opening times – days** window, enter two values, e.g.:
1. *from Monday to Wednesday:*
2. *on Thursday and Friday:*

In the **Opening times – hours**, enter also two values, which corresponds to the values of the opening times in days:
1. *from 10 am to 7 pm* (i.e. opening times for the first three working days of the week)
2. *from 9 am to 4 pm* (i.e. opening times for Thursday and Friday)

In the **Note** window, enter one value:
1. *summer opening times*

When searching for the library data in the COLIB database (online), the data on the opening times will be displayed in the following form:

… from Monday to Wednesday: from 10 am to 7 pm, on Thursday and Friday: from 9 am to 4 pm, summer opening times

The data that is entered under the **Data for COLIB(2)/Departments/opening times** tab will be transferred to the COLIB database when the home library data is saved (in the **Home library** editor, click the **OK** button). Next to these data, the data that is entered under the **Data for COLIB (2)/Departments (COBISS+, mCOBISS)** tab and some other data on the home library, which is normally saved in the COBISS3 environment in the **Home library** and **Partner** classes, will also be transferred to the COLIB database: head office address, library's URL and VAT ID number or tax number (from the **General** tab) and the URL address where the conditions for ordering material and the price list for interlibrary loan services are published (from the **Details** tab).

2.1.5.2 Entering contact details of the library and its lending departments for the needs of the COBISS+ software and the mCOBISS application

Contact details of the library and its lending departments for the needs of the COBISS+ software and the mCOBISS application are entered in the **Home library** editor under the **Data for COLIB (2)/Departments (COBISS+, mCOBISS)** tab.

In libraries where loan is organized by departments, every department where material is put on loan (even departments without computerized loan) is normally entered; (however, in school libraries where loan is organized by departments, data on the department that is defined as textbook fund is **not entered**). When entering data on the new department, enter a two-digit department code or select it from the code list that includes library departments from the local code list of departments (CODE 301). After you enter the department code, the department name will be transferred to the edit box under "Department name (for COBISS+, mCOBISS)", where you can change it. Entering this data is mandatory. Enter also the following data: postal address, telephone number, e-mail address, the data about opening times of the department for users (opening times in days and hours, a note and GPS coordinates (in decimal degrees) for viewing the department's location on the map. The GPS coordinates must be entered within the specified range (the X coordinate in the range of –90.0 to 90.0, and the Y coordinate in the range of –180.0 to 180.0 decimal degrees). By clicking the **Open COLIB** button, you can check if you entered the correct GPS coordinates for the display of the library location on the map. In the part of the window where the map is display, click on the sign to check if the location is correct. If the library has loan organised by departments, the locations of all departments will be shown on the map (not just the department for which you wish to check if the GPS coordinates are correct).

Note:

*After you click the **Open COLIB** button, the entered GPS coordinates for the display of the library location or department location on the map is saved in the COLIB database, while the **Departments (COBISS+, mCOBISS)** window in which this data is entered, remains open.*

Note for libraries where loan is organized by departments:

*The data on the opening times of loan departments for the purposes of COBISS+ software and the mCOBISS app is entered in the same way (opening times in days and hours) as the data on the opening times of library departments under the **Data for COLIB (2)/Departments/Opening times** (see chapter 2.1.5.1).*

Note for libraries where loan is organized by departments:

In school libraries where loan is organized by departments, data on the department that is defined as text fund is not entered!

In a library where loan is organized by departments, only general data on the library can be entered. In this case, leave the »Department« edit box empty.

If loan in your library is not organized by departments, enter the following contact details of the library under the **Home library/Data for COLIB (2)/Departments (mCOBISS)** tab: short library name, postal address, telephone number, e-mail address, and coordinates for viewing the library location on the map.

Note:

In libraries where loan is not organized by departments, only contact details of the library can be saved in the COLIB database for the needs of the COBISS+ software and the mCOBISS application (you can create only one object)!

Note:

*When a library changes its e-mail address, telephone number or fax number, you must change the data under the general home library data (**General** tab), under the library department data (**Data for COLIB (2)/Departments/opening times** tab), where the library data is entered (i.e. the first department in the list of departments). If loan in the library is not organized by departments, the data must also be changed under the data where contact details of the library for the needs of the COBISS+ software and the mCOBISS application are entered (**Data for COLIB (2)/Departments (COBISS+, mCOBISS)** tab). Based on this data, the so-called distribution lists for library notifications are created daily by IZUM.*

When the postal address of a specific lending department is changed (if loan in a library is organized by departments), change it under the department data *under the **Details/Lending departments** tab and under the **Data for COLIB (2)/Departments (COBISS+, mCOBISS)** tab.*

2.1.5.3 Sorting data in the COLIB record

In the COLIB record, you can sort:

- library departments
- library's opening times
- lending departments for the needs of mCOBISS application

Procedure

1. Find and select the **Home library** object.
2. Select the **Object / Sort data in COLIB record** method.

   A window will open, where you can select the type of data that you wish to edit.
3. Select the type of data and click the **OK** button.
   - If you select library departments for editing, a window will open with a list of names of the departments that you entered in the **Home library** editor under the **Data for COLIB (2)/Departments/opening times** tab, where at least contact details are entered (e-mail address, telephone numbers and fax numbers).
   - If you select data on the library's opening times for editing, a window will open with a list of names of the departments that you entered in the **Home library** editor under the **Data for COLIB (2)/Departments/opening times** tab, where at least opening times are entered (in days and hours).
   - If you select lending departments for the needs of the COBISS+ software and the mCOBISS application for editing, a window will open with a list of the departments that you entered in the **Home library** editor under the **Data for COLIB (2)/Departments (COBISS+, mCOBISS)** tab.
4. Sort the data. You can move the department in the list one place ***up***, if you highlight it in the list and click the **Up** button, or you can move it one place ***down*** if you click the **Down** button. If you wish to move the selected department up or down for several places, enter the selected number under "Number of places" and then click the **Up** or **Down** button.
5. Close the window by clicking the **OK** button.

2.2 SEARCHING LIBRARY DATA IN THE COLIB DATABASE

You can search for data on libraries in the COBISS system, which is saved in the COLIB database.

Procedure

1. In the part of the window containing modules and classes, select the **Application administration** software module.
2. Select the **COLIB** class.
3. Select the **Class / Search** method.
4. Find and select data on the library in the COBISS system.

After you select the object and add it to the workspace, certain library data, which is saved in the COLIB database, is displayed in the editor in the part of the window containing the list of the **COLIB record** class attributes; you can view the data also in the viewer (see chapter *2.3*).

Options

If you know the library code, the quickest way to find library data in the COLIB database and load it to workspace is to use the **Class / Search by key** method.

2.3 VIEWING LIBRARY DATA IN THE COLIB DATABASE

You can view library data in the COBISS system, which is saved in the COLIB database, in the viewer.

Procedure

1. Find and select library data in the **COLIB** class (see chapter *2.2*).
2. Select the **Object / Show** method.

The **Viewing – COLIB record** window will open, where data on the selected library is displayed in a format in which you last viewed the data from the **COLIB** class.

In the viewer, you can view the selected record on the library either in the basic display format or in the MARC format.

In the basic display format (under the **Basic display format** tab), library data is displayed in the list of attributes form.

The MARC format display (under the **MARC** tab) enables viewing library data in the COLIB database in the form of field and subfields. First, the record data (record ID, record local number, record version designation, date of record creation, etc.) is listed, followed by fields and subfields.

When printing records, the following colours are used:

- red for field numbers
- green for subfield designations
- black for subfield contents

3 PARTNERS

During the process of acquiring monographs, serials, electronic resources and in the case of interlibrary loan, you deal with partners.

When acquiring monographs, partners can act as:

- suppliers
- exchange partners
- legal deposit providers
- donors
- financiers

When acquiring serials, partners can act as:

- suppliers
- financiers

When acquiring electronic resources, partners can act as:

- suppliers
- financiers

For interlibrary loan, partners can act as:

- suppliers
- customers

To enter and edit the partner data, you will require the following privilege: *ADM_PARTNER – Partner data maintenance*.

Subchapters:

- Entering partner data
- Deleting partner data
- Adding partner data to the local code list of suppliers

3.1 ENTERING PARTNER DATA

Procedure

1. Select the **Partner** class. Then, select the **Class / New object** method.

   The **Partner/General** editor will open.

2. Enter the general data on the partner (see chapters *3.1.1*, *3.1.1.1* and *3.1.1.2*).
3. Specify the partner's roles and enter detailed data on the roles (see chapter *3.1.2*).
4. Enter the data on contacts (see chapter *3.1.3*).
5. Save the data.

If you enter your library code – the library identification number in the COBISS system, to the general data on a partner, the program will, when saving data, automatically check if a partner with the same library code has already been saved in the database on partners and if it is an active partner. If so, a notification will be displayed and you will not be able to enter data on the partner until the library code is either changed or deleted.

3.1.1 Entering general data

Use the **Partner/General** editor to enter the general data on your partners. Data entry can be made easier by downloading the data from the COLIB database or the database of members, if the data had already been saved in either or both of the aforementioned databases. In that case, download the data ***first*** (see chapters *3.1.1.1* and *3.1.1.2*), then check and correct it if necessary. Once you have done that, add the missing data.

Procedure

1. Under "Symbol", enter the symbol which uniquely identifies the partner and which will be used for searching for objects by key. The symbol can include one or more letters or numbers (alphanumeric signs) and an underscore ("_"). Usually, the symbol is identical to the acronym of the library in the COBISS system.

> Note:
>
> *Be careful when you define the symbol, because you cannot change it any more once you save the data. The partner data is saved to the database as soon as you enter the detailed data on the roles or the data on contacts.*

2. Enter the partner's name and second name.

Example:

The partner is Cankarjeva založba, the unit is Knjigarna Maribor. Under "Name", enter *Cankarjeva založba*, under "Second name", enter *Knjigarna Maribor*.

3. Enter the data on the partner's head office: street and number, post code, city and country.
4. Enter the telephone number, fax number, the e-mail address and the partner's homepage.
5. Under "Form of communication" define the most commonly used form of communication with the partner. The default value is set to *E-mail*, which you can change. The data will be used when preparing reports in the modules COBISS3/Acquisitions, COBISS3/Serials and COBISS3/Interlibrary Loan, which are sent to the selected partner's head office, and is mandatory.
6. Under "Language of communication", define the language you will use to send documents to the selected partner. The value *Slovene* will be suggested, which you can change. The data will be used when preparing reports in the modules COBISS3/Acquisitions, COBISS3/Serials and COBISS3/Interlibrary Loan, which are sent to the selected partner's head office, and is mandatory.
7. If your partner is a library that is included in the COBISS system, enter its library code under "Library code". If you are not familiar with the library code, use the code list to find and select it.

Note:

It is not mandatory to enter this data. Add it if your partner is a library included in the COBISS system and you want the data on the customer to already be included in the ILL request, when the library sends you an order of the type COBISS3/ILL-order.

Once the entered data on a partner is saved, it cannot be changed. The data on a partner is already saved in the database when entering detailed data on roles or when entering data on contacts.

Note:

In the database on partners you can save several partners with the same library code but only one partner can be active. If you wish for another partner with the same library code to become active, mark the current partner as inactive first.

8. Under "Partner ID in Accounting", enter the ID number your library's accounting department is using for that partner. The partner ID will also be included as a part of the reference number on the invoices for interlibrary loan services.

9. If the partner is a non-profit organisation, tick the "Non-profit organisation" check box.
10. If the partner is identified for VAT purposes, tick the "Identif. for VAT purpose" check box.
11. If the partner is identified for VAT purposes, enter the VAT ID number (i.e. the tax number with the prefix SI) under "VAT ID No./Tax No.". If you did not tick the "Identif. for VAT purpose" check box, because the partner is not identified for VAT purposes, leave the text box blank, or enter the partner's tax number.
12. Enter the transaction account number or the sub-account number and the branch of the bank or the competent authority (e.g. Public Payments Administration of the Republic of Slovenia), where the partner has an account or sub-account. This value is for informational purposes only.
13. If, for any reason, you decide to terminate the cooperation with a partner, tick the "Non-active" check box. You can then no longer select the partner for the roles you defined for that partner (e.g. customer and supplier for interlibrary loan, supplier of monographs and serials, financier, etc.).

    If you mark a partner as inactive, the corresponding contact persons and departments will be marked as inactive automatically when saving data.

    If you mark the inactive partner as active, the corresponding contact persons and departments will also become active when saving data, and a note will be displayed.

> Note:
>
> *You can mark partners as active again only if there are no active partners with the same library code in the database on partners.*

14. Click the **Note** button. A window will open. Use it to add notes and then click the **OK** button.
15. If the partner (e.g. Ekonomsko-poslovna fakulteta) is part of an organisation (e.g. Univerza v Mariboru), click the **Superior partner** button. The **Search – Partner** finder will open. Find and select the superior partner (in this case Univerza v Mariboru).

3.1.1.1 Downloading data from the COLIB database

If the data on your library that you wish to enter to the database on partners are stored in the COLIB database, it can be downloaded from that database. Once the download is completed, check the data and correct it if necessary, then add the missing data on your partner (see chapter *3.1.1*).

Procedure

1. In the **Partner** editor, click the **Download from COLIB** button.

   The **Search – COLIB record** search window will open.
2. Find and select library data.

After you select your library data, the following data will be downloaded from the COLIB database to the corresponding fields under partner data: name, street and number, postcode, city, country, telephone number, fax number, e-mail address and homepage URL, VAT ID number or tax number, library code and library acronym in the COBISS system.

3. Check the data and correct it if necessary.
4. Enter other general data on the partner (see chapter *3.1.1*).

Options

The ***fastest*** way to download library data from the COLIB database is to enter its library code under "Library code" in the **Partner** editor (if you do not know the library code, you can find it and select if from the local code list), and click the **Download from COLIB** button.

Note:

It is possible that the library code is not in the library code list and the library data is in the COLIB database.

3.1.1.2 Downloading data from the members database

If the partner data is already stored in the database of members, you can automatically download the data from that database. In that case, download the data ***first***, then check and correct it if necessary. Once you have done that, add the missing data (see chapter *3.1.1*).

Procedure

1. In the **Partner** editor, click the **Download from the database of members** button.

   The **Search – Member** finder will open. Find the data on the natural person or the legal entity, highlight it and click the **Select** button.

   The following data will be downloaded from the database of members: the name of the member or the institution under "Name", and the following data will also be downloaded from the COLIB.SI database to the corresponding fields: street and number, postcode, city, country, telephone number, fax number, e-mail address of the member or the institution.
2. Check the data and correct it if necessary.
3. Enter the remaining general data on the partner (see chapter *3.1.1*).

3.1.2 Defining partner roles

Due to the fact that partners can have many roles and can act as e.g. suppliers or customers for interlibrary loan, suppliers of monographs, serials and electronic resources, financiers, donors, legal deposit providers, etc., you have to define the roles of each partner. You can select from the following:

- *Supplier (ILL)* – supplier for interlibrary loan

- *Customer (ILL)* – customer for interlibrary loan
- *Supplier (ACQ)* – supplier of monographs
- *Supplier (S)* – supplier of serials
- *Supplier (E)* – supplier of electronic resources
- *Legal deposit provider (ACQ)* – sender of the legal deposit copy
- *Exchange partner (ACQ, S)* – recipient or sender of the material sent from or for exchange purposes (monographs and serials)
- *Financier (ACQ, S, E)* – financier of acquired material (monographs, serials and electronic resources)
- *Donor (ACQ)* – donor of monographs

To define the roles of the partners in relation to your library, use the **Partner/Roles and contacts** editor.

Procedure

1. Click on one or several check boxes to tick them.
2. If you selected at least one of the following roles: "Supplier (ILL)", "Customer (ILL)", "Supplier (ACQ)", "Supplier (S)", or "Supplier (E)" click the **Details** button to enter additional data.

   The **Partner roles/Supplier (ILL)** window will open.
3. Enter the data, if the partner acts as a supplier for interlibrary loan (see chapter *3.1.2.1*).
4. If the partner acts as a customer for interlibrary loan, click the **Customer (ILL)** tab and enter the data (see chapter *3.1.2.2*).
5. If the partner acts as a supplier of monographs, click the **Supplier (ACQ)** tab and enter the data (see chapter *3.1.2.3*).
6. If the partner acts as a supplier of serials, click the **Supplier (S)** tab and enter the data (see chapter *3.1.2.4*).
7. If the partner acts as a supplier of serials, click the **Supplier (E)** tab and enter the data (see chapter *3.1.2.5*).
8. Save the data.

Next to the **Details** button, some more detailed data on the individual roles of the partner will be displayed; first the data on the role of the supplier for interlibrary loan, then for the customer for interlibrary loan, then data on the role of the supplier of monographs, followed by data on the supplier of serials. The individual sections of data are separated by a forward slash ("/"). The format and content of the record are as follows: Order type (ILL); Reserve of time (days) (ILL); Our customer code (ILL) / Delivery method (ILL) / Delivery time (days) (ACQ); Overpaym. amount (ACQ); Our customer code (ACQ) / Overpaym. amount (S); Our customer code (S).

3.1.2.1 Entering data on the supplier for interlibrary loan

To enter more detailed data on the partner acting as the supplier for interlibrary loan, use the **Partner roles/Supplier (ILL)** editor.

Procedure

1. Under "Reserve of time (days) (ILL)", enter the number of days, which will be used when calculating the expected return date for the material borrowed by the customer. The date is calculated by subtracting the number of days in the field "Reserve of time (days) (ILL)" from the date defined by the supplier as the return date.

> Example:
>
> If you entered the date *16.03.2007* under "Due date (to supplier)" when you recorded the receipt of the material, and the number of days entered in the field "Reserve of time (days) (ILL)" is two (*2*), the calculated expected return date for the material is *14.03.2007* for the customer, which means that you have two additional days to return the material to the supplier.

2. Under "Our customer code (ILL)", enter the code that is used by the supplier to record the data on your library as a customer. The value will also be a part of the Order document. Entering this information is optional, however, it has to be added for suppliers, to whom you submit orders via *ARTEmail* or *subito*.
3. Under "Password (ILL)", enter the password you received from the supplier to whom you submit orders via *ARTEmail* or *subito*.
4. Under "Order type (ILL)", the default value is set to *E-mail*, which defines the layout of the Order document and the sending method for the document to the supplier. The default value can be changed. This value will be suggested when you prepare an order for that supplier.
5. Under "Method of receipt (ILL)", the default value is set to *By post*, which defines in what way you wish to receive the material from the supplier. The default value can be changed. This value will be suggested when you prepare an order for that supplier.
6. Under "Return method (ILL)", the default value is set to *By post*, which defines in what way you wish to return the material to the supplier. The default value can be changed. This value is for informational purposes only.
7. Under "Payment method (ILL)", enter the method you will use to pay the supplier. This value will be suggested when you prepare an order for that supplier.
8. Click the **Supplier note (ILL)** button. A window will open. Use it to add notes and then click the **OK** button.

3.1.2.2 Entering data on the customer of interlibrary loan services

To enter more detailed data on the partner acting as the customer for interlibrary loan, use the **Partner roles/Customer (ILL)** editor.

Procedure

1. Under "Delivery method (ILL)", the default value is set to *By post*, which defines in what way you wish to deliver the material to the customer. The default value can be changed. This value will be suggested when you record the customer's ILL request.
2. Under "IP address (ILL)", enter the IP address of the customer's computer, to which you are going to send the material using Ariel software. Ariel allows you to scan documents and send them in electronic form.
3. Under "Payment method (ILL)", enter the method the customer will use to pay for the service. This value is for informational purposes only.
4. Click the **Customer note (ILL)** button. A window will open. Use it to add notes and then click the **OK** button.

3.1.2.3 Entering data on the supplier for acquisitions

To enter more detailed data on the partner acting as the supplier of monographs, use the **Partner roles/Supplier (ACQ)** editor.

Procedure

1. Under "Delivery time (days) (ACQ)", enter the number of days it normally takes the supplier to deliver the material ordered. The data will be used when preparing orders and defining the date, by which the supplier must deliver the material ordered.
2. Under "Claim time limit (days) (ACQ)", enter the number of days which will be tolerated if the supplier's delivery is late. The data will be used when preparing claims for undelivered material.
3. Under "Payment due (days) (ACQ)", enter the number of days after which you usually have to pay for the material received, starting with the date of dispatch. The data will be used when the invoice, received by the supplier, is recorded.
4. Under "Discount rate (ACQ)", enter the discount rate which you arranged with the supplier. The data will be used when preparing the order item.
5. The amount of overpayments to the supplier is calculated automatically. It is increased when the advance paid is larger than the amount stated on the invoice, which you can check on the invoice under "Credit balance". It will decrease if you wish to pay an invoice by using the amount of previous overpayments and enter the amount on the invoice under "Draw upon overpayment" (see *COBISS3/Acquisitions User Manual*, chapter *3.5.7)*. The same applies to the amount of overpayment in a foreign currency.

   Each change in the overpayment to the supplier is recorded in the **Overpayment** class. The following data will be recorded: current number, type of overpayment entry, supplier, order number and invoice number, amount, foreign amount, fund, note, information about the person who recorded the invoice, time and date of creation.

Sometimes you have to change the amount of overpayment (in the domestic or the foreign currency), e.g. after you enter the data on partners or when you check and readjust the data and the accounting records (see chapter *3.1.2.3.1*). You cannot change the amount of overpayment in the **Partner roles/Supplier (ACQ)** editor.

6. Under "Our customer code (ACQ)", enter the code that is used by the supplier to record the data on your library as a buyer.
7. Click the **Supplier note (ACQ)** button. A window will open. Use it to add notes and then click the **OK** button.
8. Under "GLN-number", enter the global location number in the GS1 system for electronic data interchange that is used to mark legal entities, natural persons and functional units. The use of the global location number is the first precondition for the exchange of business documents.

3.1.2.3.1 Readjusting overpayment amounts

The amount of overpayment can be increased or decreased in both the domestic and the foreign currency.

Procedure

1. Find and select the partner in the **Partner** class.
2. Select the method **Object** / **Overpayment readjustment (ACQ).**

   The window for adjusting amounts will open.

   Under "Amount difference", enter the desired amount in the domestic currency, for which you wish to increase or decrease the amount of overpayment for the partner.

   Under "Fund", select the appropriate value.

   Under "Foreign amount difference", enter the desired amount in the foreign currency, for which you wish to increase or decrease the amount of overpayment for the partner. Select the currency from the drop-down list.

> Example:
>
> If you wish to increase the amount of overpayment to the supplier by 150.40 EUR, enter *150.40* to "Amount difference". If you wish to decrease the amount of overpayment by 150.40 EUR, enter -*150.40* to "Amount difference".

3. Enter the note.
4. Click the **OK** button.

3.1.2.4 Entering data on the supplier of serials

To enter more detailed data on the partner acting as the supplier of serials, use the **Partner roles/Supplier (S)** editor.

Procedure

1. Under "Claim time limit (days) (S)", enter the number of days which will be tolerated if the supplier's delivery is late. The data will be used when preparing claims for missing issues.
2. Under "Payment due (days) (S)", enter the number of days after which you usually have to pay for the serials received. The data will be used when you record the invoice you received from the supplier.
3. Under "Discount rate (S)", enter the discount rate which you arranged with the supplier. The data will be used when preparing the order item.
4. The amount of overpayments to the supplier is calculated automatically. It is increased when the advance paid is larger than the amount stated on the invoice, which you can check on the invoice under "Credit balance". It will decrease if you wish to pay an invoice by using the amount of previous overpayments and enter the amount on the invoice under "Draw upon overpayment" (see also *COBISS3/Serials User Manual*, chapter *3.7.4)*. The same applies to foreign amounts of overpayment.

   Each change in the overpayment to the supplier is recorded in the **Overpayment** class. The following data will be recorded: current number, type of overpayment entry, supplier, order number and invoice number, amount, foreign amount, fund, note, information about the person who entered the invoice, time and date of creation.

   Sometimes you have to change the amount of overpayment (in the domestic or foreign currency), e.g. after you enter the data on partners or when you check and adjust the data to the accounting records (see chapter *3.1.2.4.1*). You cannot change the amount of overpayment in the **Partner roles/Supplier (S)** editor.
5. Under "Our customer code (S)", enter the code which is used by the supplier to record the data on your library as a buyer.
6. Click the **Supplier note (S)** button. A window will open. Use it to add notes and then click the **OK** button.

3.1.2.4.1 Readjusting overpayment amounts

See chapter *3.1.2.3.1*.

3.1.2.5 Entering data on the supplier of electronic resources

To enter more detailed data on the partner acting as the supplier of electronic resources, use the **Partner roles/Supplier (E)** editor.

Procedure

1. Under "Payment due (days) (E)", enter the number of days after which you usually have to pay for the electronic resource received. The data will be used when you record the invoice you received from the supplier.
2. Under "Discount rate (E)", enter the discount rate which you arranged with the supplier. The data will be used when the invoice is recorded.
3. The amount of overpayments to the supplier is calculated automatically. It is increased when the advance paid is larger than the amount stated on the invoice, which you can check on the invoice under "Credit balance". It will decrease if you wish to pay an invoice by using the amount of previous overpayments and enter the amount on the invoice under "Draw upon overpayment". The same applies to foreign amounts of overpayment.

   Each change in the overpayment to the supplier is recorded in the **Overpayment** class. The following data will be recorded: current number, type of overpayment entry, supplier, order number and invoice number, amount, foreign amount, fund, note, information about the person who entered the invoice, time and date of creation.

   Sometimes you have to change the amount of overpayment (in the domestic or foreign currency), e.g. after you enter the data on partners or when you check and adjust the data to the accounting records (see chapter *3.1.2.5.1*). You cannot change the amount of overpayment in the **Partner roles/Supplier (E)** editor.
4. Click the **Supplier note (E)** button. A window will open. Use it to add notes and then click the **OK** button.

3.1.2.5.1 Readjusting overpayment amounts

See chapter *3.1.2.3.1*.

3.1.3 Entering data on contacts

For the partner, you can define the following:

- a contact person
- a contact department

For every contact person or contact department you can define whether their name and contact details (address, e-mail address) will be used and displayed as the recipient's address on the documents in the individual COBISS3 software modules (interlibrary loan, acquisitions, serials). If you do not specify them, only the data on the head office address of the partner will be used and displayed.

> Note:
>
> *You can define several contact persons or contact departments for one partner, which will be used and displayed as the recipient's address within the documents in the individual modules.*

3.1.3.1 Entering data on the contact person

See chapter *2.1.3.1*.

3.1.3.2 Entering data on the contact department

See chapter *2.1.3.2*.

3.2 DELETING PARTNER DATA

You can delete the data on a partner from the database.

Precondition

You have not yet included the partner in any procedures within the software modules COBISS3/Acquisitions, COBISS3/Serials or COBISS3/Interlibrary Loan.

Procedure

1. In the **Partner** class, find and select the partner.
2. Select the method **Object / Delete**.

   The **Partner** window will open with the question "Are you sure you want to delete this partner?".
3. Click the **Yes** button.

3.3 ADDING PARTNER DATA TO THE LOCAL CODE LIST OF SUPPLIERS

The data on those partners acting as suppliers for acquisition and serials can be entered to the local code list of suppliers labelled CODE 91.

Procedure

1. Select the **Partner** class, and then the method **Class / Add suppliers (ACQ, S) to the local code list of suppliers**.

   The **Data entry method** window will open. Use it to select the type of data entry.

2. If you wish to overwrite the existing local code list with the partner data on the partners acting as suppliers for acquisitions and serials, click the **Yes** button.

3. If you wish to add new or edited values for partners acting as suppliers for acquisitions and serials within the existing code list, click the **No** button.

4 USERNAMES

Usernames are saved in the **User** class. Data on usernames is maintained at the **Training** portal by the local applications administrator; in the COBISS3 software this data is saved in the users database once the system users logs in with the username defined for him/her in the Central Register of Users (CRU).

The system user with the following privileges: *ADM – Access to COBISS3/Application Administration, and data viewing and printing* and *ADM_USER – Username maintenance* can re-set the user settings for other users to the default settings and reconcile the data on the selected user or on all users with the data in CRU.

Subchapters:

- Viewing the data on system users
- Reconciling data with the Central Register of Users (CRU)
- Clearing user settings

4.1 VIEWING USER DATA

The data on the system user is reconciled with the data in CRU every time the users logs in to the COBISS3 software.

The privileges *ADM – Access to COBISS3/Application Administration, and data viewing and printing* and *ADM_USER – Username maintenance* are required to view the data on system users.

Precondition

The system users has logged in to the COBISS3 software with the username that is defined in the Central Register of Users (CRU) at least once before.

Procedure

1. In the **User** class find and select the data on the system user.

   The data on the selected system user, which is maintained at the **Training** portal, can be seen in the browser, in the part of the window containing the list of the following attributes:

   - the username that the system user uses to log in to the COBISS3 software (value under the "Username")
   - user's name and surname (values under "Name" and "Surname"); the data is entered at the place provided for signature on reports created and sent to destinations by the user
   - a word or phrase indicating a term of address (e.g. *Mr, Ms, Miss,* etc.) or an academic title (e.g. *Prof., Dr.*, etc.); the data appears before the user's name and surname on reports created and sent to destinations by the user
   - professional title indicating higher or high educational qualification (value under "Professional title"); the data appears after the user’s name and surname on reports prepared and sent to destinations by the user
   - a position indicating a job or a post in an organisation (value under "Position"); the data appears under the user’s name and surname on reports prepared and sent to destinations by the user
   - a position indicating a job or a post in an organisation in the English language (value under "Position – English"); the data appears under the user’s name and surname on reports in English prepared and sent to destinations by the user
   - e-mail address of the user, library, department, etc. (value under "E-mail"); the data appears under "From" when the users sends reports by e-mail
   - user’s telephone number (value under "Telephone")
   - login disabled as the user will no longer log in to the COBISS3 software ("Login disabled" checkbox ticked)

- login disabled as the user made a mistake six times while logging in to the COBISS3 software ("Password locked" checkbox ticked); if this checkbox is ticked, the user must set a new password at the **Training** portal before logging in to the COBISS3 software
- date and time when the user logged in to the COBISS3 software or logged off for the last time (values under "Last login" and "Last logoff")
- date and time when the user last entered a wrong password when logging in to the COBISS3 software (value under "Last incorrect password entry")
- departments or organizational units of the library where the user can carry out serials check-in (value under "Check-in for departments"); if the value is not specified, the user can carry out serials check-in for all departments or organizational units of the library
- the date for which the user can enter loan transactions manually as it was not possible to record them automatically (value under "Date of procedures")
- one or more departments (if the loan in the library is organised by departments) where the user can log in to and enter lending procedures (value under "Lending departments")

To view privileges for work in the COBISS3 software of the selected user, select the folder **Privileges** under related objects.

4.2 RECONCILING DATA WITH THE CENTRAL REGISTER OF USERS (CRU)

If the data on system users is not reconciled with the data in the Central Register of Users (CRU) – because after having opened the username, the user has not logged in to the COBISS3 software for a long time, due to communications errors, due to changes in CRU, etc. – , you can reconcile the data.

To reconcile the data with the data in the Central Register of Users (CRU), following two privileges are required: *ADM – Access to COBISS3/Application Administration, and data viewing and printing* and *ADM_USER – Username maintenance.*

Procedure

1. Select the **User / Reconcile data with CRU** method.

After reconciliation, the data on system users is the same as the data in the CRU.

After reconciliation of the data with the CRU data, the changed data on users will be considered after they logoff and re-login.

Options

If you wish to reconcile the data on a particular user with the CRU data, find and select the relevant data first. Then click the **Download from CRU** button in the **User** editor.

4.3 CLEARING USER SETTINGS

Sometimes a user will want to re-set their personal settings to the original default settings. The user settings include:

- window size
- font
- user destinations
- logical destinations
- personal address book
- queries
- shortcuts
- hit list format

In such a case, the local applications administrator must delete all the settings which were valid for that username.

To delete user settings, the following privileges are required: *ADM – Access to COBISS3/Application Administration, and data viewing and printing* and *ADM_USER – Username maintenance*.

Procedure

1. In the **User** class, find and select the username.
2. Select the **Object / Clear all user settings** method.

   The **User** window will open with the question "Are you sure you want to delete all user settings?".
3. Click the **Yes** button.

Note:

Only clear the user settings for the selected username when the user is not logged into the COBISS3 software under that username. Otherwise, the existing settings will be saved again when the user exits the COBISS3 software.

A ADDRESSES ON REPORTS

Once you install the COBISS3 software, your library will have access to all the standard reports. Based on the report definitions (which determine the content and form of each report as well as the destinations where the particular report is sent to) and the data from the database, you can prepare reports during the process of acquisition of serials and monographs as well as during the process of interlibrary loan. The reports can then be sent to the actors involved (e.g. customers and suppliers for interlibrary loan, suppliers of monographs and serials, donors, financiers, etc.).

The definitions for the standard reports assure, to the highest extent possible, a uniform document layout for document sections or entire documents in terms of addressing and marking documents, descriptions of individual items using bibliographic data on the material, headers and footers on a page, etc.

This chapter provides a description of the structure of addresses in the reports within the COBISS3 software modules. The data, maintained in the **Home library** class and the **Partner** class**,** will be used and displayed as the address on the report. The data on the home library will be displayed as the sender's address, while the data on partners will be used and displayed as the recipient's address. The standard reports for all documents, sent by post, fax or e-mail are in compliance with the IFLA guidelines for sending consignments by fax and post and conform to the rules and legal requirements for addressing consignments, as defined by the Post Office of the Republic of Slovenia (*Pošta Slovenije*).

The country codes comply with the ISO country code list for international addressing of consignments. For foreign recipients, the country name can be displayed in the English language, if you select English under "Language". Some foreign postal services (e.g. in Germany) use optical readers for reading addresses and recommend for the recipient country name to be written in either the language of that country or in English.

All documents, which can be sent by post, are designed to fit standard window envelopes, so that the recipient's address is visible through the window on the left side. If you want the address to be displayed on the right side, the corresponding parameter can be re-set in the configuration file.

A.1 SENDER'S ADDRESS

On all reports, which will be sent by post or fax, the sender's address will be displayed on the right side. The data on the home library will be used: first the ***mailing address***, which is used within a certain module, usually followed by the data on the ***head office*** of the home library.

A.1.1 Mailing address

The mailing address consists of the following data in the order listed below:

- ***Official name of the home library***. If the name is longer than 8 centimetres, it will be spread out over more than one line. The attribute values under "Name" and "Second name" within the **Home library** class will be displayed. Each attribute value can take up no more than two lines.
- ***Name of the contact department or the contact person***, if specified for the home library. It takes up one line. The attribute value under "Name" within the **Contact department** class, or the attribute values under "Title", "Name", "Surname", "Professional title" and "Department" within the **Contact person** class will be displayed.
- ***Street and number***, entered in the data on contacts or the data on the home library's head office. The attribute value under "Street and No." within the **Contact department** class, **Contact person** class or **Home library** class will be displayed. In the case of P.O. box holders, the abbreviation *P.O. Box* will be displayed automatically instead of the street and number, followed by the attribute value under "P.O. Box" within the **Contact department** class or **Contact person** class. The data on the street and number or the P.O. box takes up one line.
- ***Postcode and city***, entered in the data on contacts or the data on the home library's head office. They take up one line. The attribute values under "Postcode" and "City" within the **Contact department** class, **Contact person** class or **Home library** class will be displayed. If the recipient is based abroad, the two-letter country code for international addressing of consignments, followed by the sign "-" will be displayed in front of the post code. The international abbreviation will be used instead of the three-letter country code, entered as a part of the data on contacts or the data on the home library's head office.
- ***Country name*** from the ISO country code list, if the recipient is based abroad. It takes up one line.
- ***Telephone number***, entered in the data on contacts or the data on the home library's head office. It takes up one line. The attribute value under "Telephone" within the **Contact department** class, **Contact**

person class or **Home library** class will be displayed.

- ***Fax number***, entered in the data on contacts or the data on the home library's head office. It takes up one line. The attribute value under "Fax" within the **Contact department** class, **Contact person** class or **Home library** class will be displayed.
- ***E-mail address***, entered in the data on contacts or the data on the home library's head office. It takes up one line. The attribute value under "E-mail" within the **Contact department** class, **Contact person** class or **Home library** class will be displayed.
- ***Customer code***, that is used by the supplier to record the data on your library. It takes up one line. The attribute value under "Our customer code (ILL)", "Our customer code (ACQ)" or "Our customer code (S)" within the **Details** class will be displayed on the reports sent to the suppliers for interlibrary loan, or suppliers of monographs or serials.

A.1.2 Head office

The head office consists of the following data in the order listed below:

- ***Official name of the home library or the superior partner of the home library***. If the name is longer than 8 centimetres, it will be spread out over more than one line, but no more than four lines. The attribute values under "Name" and "Second name" within the **Home library** class, or the **Partner** class, if the home library has a superior partner, will be displayed. Each attribute value can take up no more than two lines.
- ***Street and number of the home library or the superior partner of the home library***. The attribute value under "Street and No." within the **Home library** class, or the **Partner** class, if the home library has a superior partner, will be displayed.
- ***Postcode and city of the home library's head office or the superior partner of the home library***. They take up one line. The attribute values under "Postcode" and "City" within the **Home library** class, or the **Partner** class, if the home library has a superior partner, will be displayed. If the recipient is based abroad, the two-letter country code for international addressing of consignments, followed by the sign "-" will be displayed in front of the post code. The international abbreviation will be used instead of the three-letter country code, entered as a part of the data on the home library's head office or the data on the partner's head office.
- ***Country name*** from the ISO country code list, if the recipient is based abroad. It takes up one line.
- ***VAT ID number or tax number of the home library or the superior partner of the home library***. It takes up one line. The attribute value under "VAT ID No./Tax No." within the **Home library** class or the

Partner class, if the home library has a superior partner, will be displayed.

A.2 RECIPIENT'S ADDRESS

On all reports, which will be sent by post or fax, the recipient's address will be displayed on the left side. The data on the partner or the library member will be used.

For the ***partner***, the ***mailing address*** will be displayed. It includes the data on contacts, which is used when preparing reports within a certain module.

The mailing address consists of the following data in the order listed below:

- ***Official name of the partner***. If the name is longer than 8 centimetres, it will be spread out over more than one line, but no more than four lines. The attribute values under "Name" and "Second name" within the **Partner** class will be displayed. Each attribute value can take up no more than two lines.

- ***Name of the contact department or the contact person***, if specified for the partner. It takes up one line. The attribute value under "Name" within the **Contact department** class, or the attribute values under "Title", "Name", "Surname", "Professional title" and "Department" within the **Contact person** class will be displayed.

- ***Street and number***, entered in the data on contacts or the data on the partner's head office. The attribute value under "Street and No." within the **Contact department** class, **Contact person** class or **Partner** class will be displayed. In the case of P.O. box holders, the abbreviation *P.O. Box* will be displayed automatically instead of the street and number, followed by the attribute value under "P.O. Box" within the **Contact department** class or **Contact person** class. The data on the street and number or the P.O. box takes up one line.

- ***Postcode and city***, entered in the data on contacts or the data on the partner's head office. They take up one line. The attribute values under "Postcode" and "City" within the **Contact department** class, **Contact person** class or **Partner** class will be displayed. If the recipient is based abroad, the two-letter country code for international addressing of consignments, followed by the sign "-" will be displayed in front of the post code. The international abbreviation will be used instead of the three-letter country code, entered as a part of the data on contacts or the data on the partner's head office.

- ***Country name*** from the ISO country code list, if the recipient is based abroad. It takes up one line.

In the case of orders, order cancellations and claims, the fax number, entered in the data on contacts or the data on the partner's head office, will be included in the address, and displayed below the data, visible through the envelope window.

In the case of delivery notes and invoices, special requirements must be met and all the required data must be included (e.g. the shipping address, billing address and the taxable entity), the data about the superior partner will be displayed along with the data on contacts and the data on the partner's head office.

For the ***library member***, the address is displayed as the recipient address, for which the use for the selected record is also specified.

Example:

On the label with the member's address, the mailing address is displayed, for which the value *label with address* is specified under "Use". On the confirmation on material return, which can be printed for the member when the material on interlibrary loan is returned, the mailing address is displayed, for which the value *return of material (ILL)* is specified under "Use".

If the use is not specified for any of the addresses for the selected report, the following order will be taken into account: permanent address, temporary address, work address, guardian/guarantor's address, guardian/guarantor's address and permanent address, guardian/guarantor's temporary address, address abroad.

In all reports, which will be sent by mail, the body of the message for the partner will include a part of the ***mailing address*** and the complete sender's address (i.e. mailing address and head office).

A.3 ADDRESS STRUCTURE ON REPORTS

Below are some examples of the structure of sender's and recipient's address within reports, which will be sent by post or fax. Because the address structure on reports also depends on the data on the home library and the partners, only correct data entries for the most commonly encountered examples are displayed.

Legend:

- HL – home library
- P – partner
- SP1 – first superior partner (superior to the home library HL or the partner P)
- SP2 – second superior partner (superior to partner SP1)

A.3.1 Structure of sender's address

1. The home library has a VAT ID number or a tax number, but does not have a superior partner.

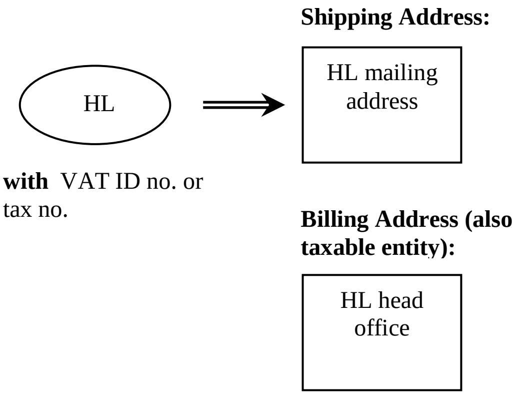

Figure A.3-1: Structure of sender's address on the order – home library without superior partner

2. The home library is entered ***without*** a VAT ID number or a tax number, but does have a superior partner with a VAT ID number or a tax number.

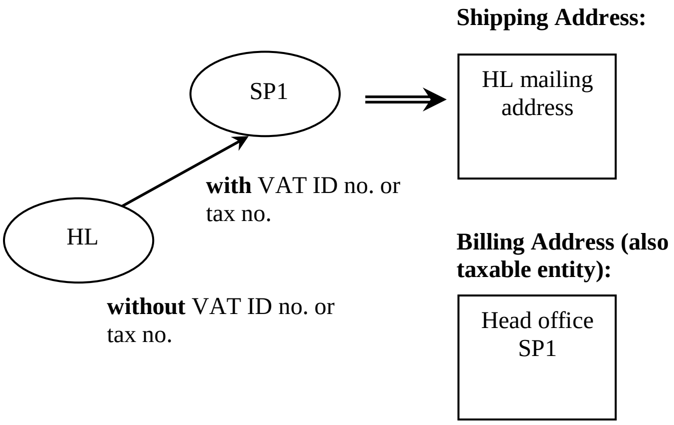

Figure A.3-2: Structure of sender's address on the order – home library with one superior partner

3. The home library is entered ***without*** a VAT ID number or a tax number. It has one superior partner that is also entered ***without*** a VAT ID or a tax number. That partner has a superior partner that does have an entered VAT ID number or tax number. Example: libraries of some faculties of the University of Maribor (e.g. Faculty of Economics and Business Library).

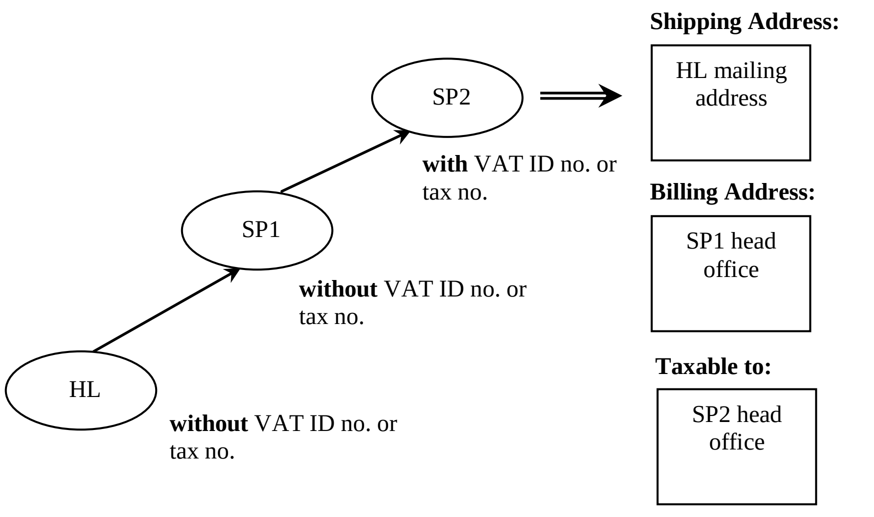

Figure A.3-3: Structure of sender's address on the order – home library with two superior partners where the first superior partner does not have an entered VAT ID or tax number

A.3.2 Structure of recipient's address

1. The partner has a VAT ID number or a tax number and does not have a superior partner.

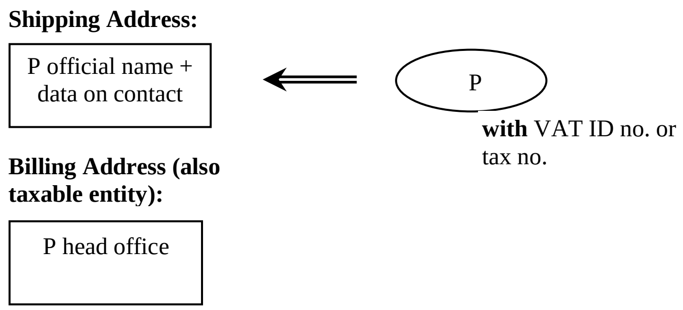

Figure A.3-4: Structure of recipient's address on the delivery note – partner with no superior partners

2. The partner is entered without a VAT ID number or a tax number. The partner has a superior partner with a VAT ID number or a tax number.

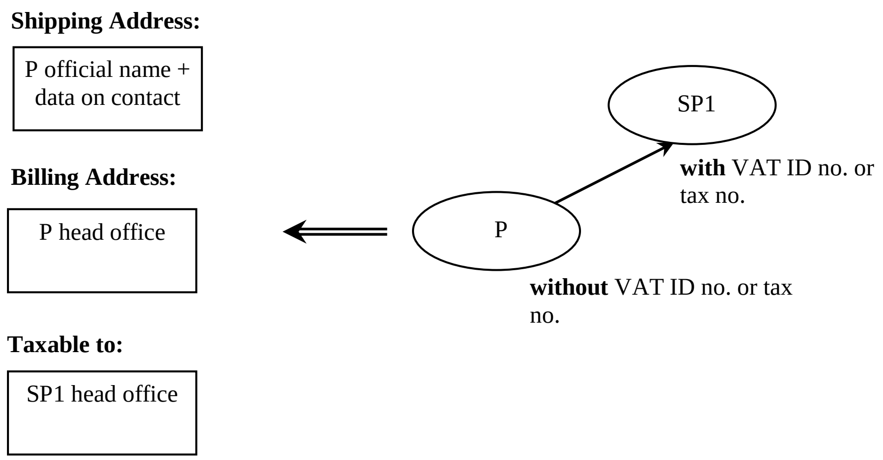

Figure A.3-5: Structure of recipient's address as a part of the delivery note – partner with one superior partner

A.4 PRACTICAL EXAMPLES OF ADDRESSING

1. Address on the order, if the sender (home library) does not have a superior partner.

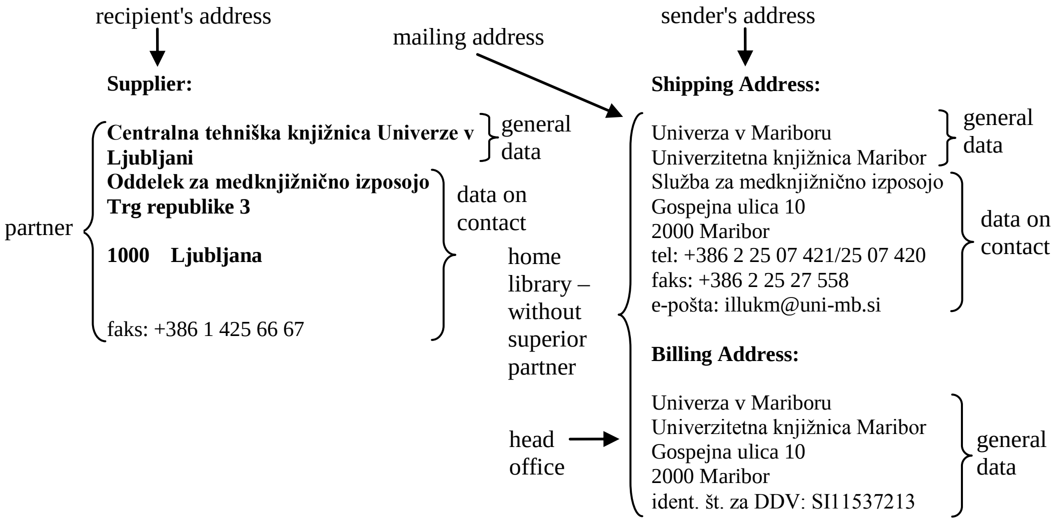

Figure A.4-1: Recipient's address on the order – home library with no superior partners

2. Address on the order, if the sender (home library) has two superior partners, where the first partner does not have an entered VAT ID number or a tax number. The home library does not have a VAT ID number or a tax number either.

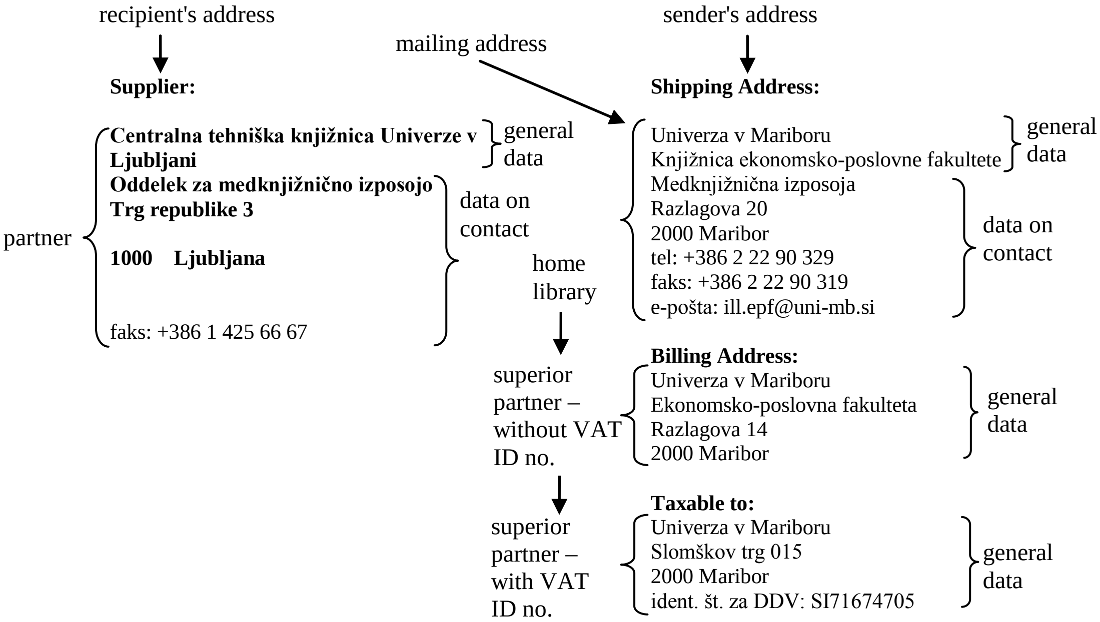

Figure A.4-2: Recipient's address on the order – home library with two superior partners

3. Address on the delivery note, if the recipient (partner) has no superior partners.

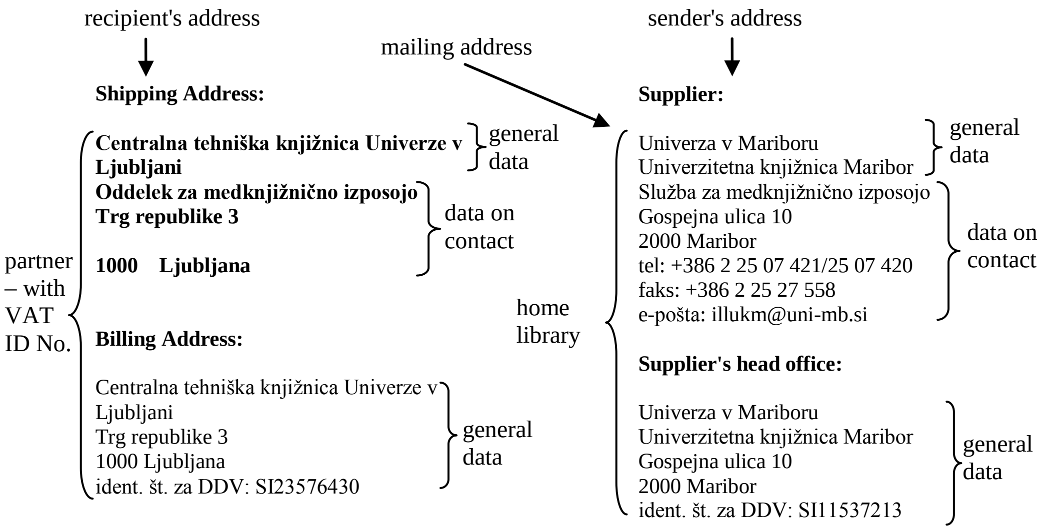

Figure A.4-3: Recipient's address on the delivery note – partner with no superior partners

4. Address on the delivery note, if the recipient (partner) does not have an entered VAT ID number or a tax number and does have a superior partner with a VAT ID number or tax number.

recipient's address

mailing address

sender's address

Shipping Address:

Univerza v Mariboru
Ekonomsko-poslovna fakulteta
general data

Knjižnica, medknj. izposoja
Razlagova 20
2000 Maribor
tel: +386 2 22 90 329
faks: +386 2 22 90 319
e-pošta: ill.epf@uni-mb.si
data on contact

partner – without VAT ID no.

Billing Address:
Univerza v Mariboru
Ekonomsko-poslovna fakulteta
Razlagova 14
2000 Maribor
general data

Taxable to:
Univerza v Mariboru
Slomškov trg 015
2000 Maribor
ident. št. za DDV: SI71674705
general data

superior partner – with VAT ID no.

Supplier:

Univerza v Mariboru
Univerzitetna knjižnica Maribor
general data

Služba za medknjižnično izposojo
Gospejna ulica 10
2000 Maribor
tel: +386 2 25 07 421/25 07 420
faks: +386 2 25 27 558
e-pošta: illukm@uni-mb.si
data on contact

home library

Supplier's head office:

Univerza v Mariboru
Univerzitetna knjižnica Maribor
Gospejna ulica 10
2000 Maribor
ident. št. za DDV: SI11537213
general data

Figure A.4-4: Recipient's address on the delivery note – partner with one superior partner

Published by:

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