COBISS®

Co-operative Online Bibliographic System & Services

COBISS3/Application Administration

V6.1-01

User Manual

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IZUM®

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Appendix

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*.

Subchapter:

- Entering home library data

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

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:
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> *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.*