

COBISS[®]

Co-operative Online Bibliographic System & Services

***COBISS3/Application
Administration***

V6.4-00

User Manual

Institute of Information Science, Maribor, Slovenia

IZUM[®]

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The manual includes all updates from the first printed version of the manual published in February 1999 onwards. Its content corresponds with the COBISS3, V 6.4-00 software, and is also valid for all future software versions until it is either withdrawn, or another electronic version is published.

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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 and **data on the contact persons** and the **contact departments**, and in libraries where loan is organised by departments (and the COBISS3/Loan software module is used), enter also the **data on the lending departments**.



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.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.*

¹ A description of entering data on business premises is expected to be included in the COBISS3/Loan User Manual in the beginning of 2016.

Certain general data on the home library 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.²
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 data for updating the COLIB database (see chapter 2.1.5).
8. 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.

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

² Because there is only one object saved in the **Home library** class, it will be loaded to the workspace when you start the search.

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 the suppliers for interlibrary loan (i.e. other libraries, included in the COBISS.SI system) orders of the type COBISS3/ILL-orders.

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. 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. The data will be displayed on the invoice, which can be prepared for services related to interlibrary loan.
11. You can also enter the type of payment card and the card number. The data is for information purposes only.
12. 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. Under "Payment due (days)" enter the number of days, during which the customer must pay for the service of interlibrary loan after the invoice was submitted by the library. The data is not mandatory. Enter the data if you want it to be used to calculate the payment due date when the invoice is prepared.
3. 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.
4. Under "Ordering terms (COBISS/OPAC)", 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/OPAC, if their library offers interlibrary loan services through COBISS/OPAC (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/OPAC 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.

5. Under "ILL restriction (COBISS/OPAC)", 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/OPAC. 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.

6. 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 that use the COBISS3/Loan software module, 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 library uses the COBISS3/Loan software module. 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 COBISS3/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 I 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 address for reservations", enter the e-mail address to which you wish to receive notifications about reservations of available material from that department, which were carried out via COBISS/OPAC. If this data is not entered, notifications about reservations of available material from that department will be sent to the e-mail address, entered under home library in the contact details and information for COBISS/OPAC.
12. 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.
13. 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)

14. 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 5.10).

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

A library with department uses the COBISS3/Loan software module. 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 m²”, “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 mCOBISS application (enter values in the **Contact department** editor, which will open after you click the **New object** button under the **Departments (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, 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 mCOBISS application are entered (**Data for COLIB (2)/Departments/opening times** tab). Based on this data, the so called distribution lists for library notifications are prepared daily by IZUM.*



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*



Note:

Under contact persons and departments, you can enter several telephone numbers, fax numbers and e-mail addresses. You can find instructions for entering data in the COBISS3 Basic Guidelines User Manual; see chapter 4.2.1.3.

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 (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 mCOBISS application

Contact details of the library and its lending departments for the needs of the mCOBISS application are entered in the **Home library** editor under the **Data for COLIB (2)/Departments (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 mCOBISS)", where you can change it. Entering this data is mandatory. Enter also the following data: postal address, telephone number, e-mail address 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).



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 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 mCOBISS application are entered (**Data for COLIB (2)/Departments (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 (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 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 (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.

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 it 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: member ID or the number or acronym of the institution under "Symbol" (only in libraries that use the COBISS2/Loan software module), the name of the member or the institution under "Name" and the name of the department under "Second name". 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, partner ID in accounting, information about non-profit organisation, VAT ID number (or tax number) and transaction account number.

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.

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