1   INTRODUCTION

The following instructions describe the procedures used to edit data on library members and the process of lending material in the library, such as:

- setting up loan parameters
- adding members
- editing member details
- deleting member details
- changing the membership card number
- finding members
- changing class or grade
- outside or reading room loan
- return of material
- loan period renewal
- changing the due date
- reservations of available and unavailable material
- entering notes on the material
- return of material
- routing lists for serials
- interdepartamental loan
- managing a price list
- entering and settling debts
- creating overdue notices
- creating overdue notice forms
- recording the loss of material
- returning material with restriction
- returning material in any library department
- loan procedures in the mobile library department
- transferring data from the reference students database

For libraries, which have been using the COBISS2/Loan software module, the following data will be transferred from the COBISS2 environment upon installation of the COBISS3/Loan software module:

- data on members from member records

Only the data, which is also a part of the attributes in the **Member** class, will be transferred.

- data on entered material (status *C – outside loan, D – on interdepartmental loan, K – routing, S – on loan (reading room), R – reserved unavailable material, O – reserved available material, W – waiting on the shelf (reserved)), U – reserved in reading room, L – lost and B – retained*)

Data on transactions from the archives and parameter settings in the library are not transferred.

In the current version, the details about other recorded material for the member are not yet being transferred (the material statuses *L – lost, B – retained*). This also applies to the data on transactions from the archives and to the parameter settings in the library.

- data on entered debts

Only the data on outstanding debts will be transferred. Data on settled debts and transactions will not be transferred.

- data on entered overdue notices

Data on current overdue notices will be transferred for the member. Only data on received overdue notice will be transferred for the already settled overdue notices, but not the data on material for which the overdue notice has been issued as the member has already returned the material.

- price list

Data for all items that were entered in the price list in the COBISS2/Loan, except for the item *MKI interlibrary loan*, will be transferred. The service price for interlibrary loan is entered differently in COBISS3 than in COBISS2 (see COBISS3/Interlibrary Loan User Manual, chapter *11.3*). For individual items in the price list, the following data will be transferred: service/debts code, description, price per unit, calculation method and tax group.

Before starting to use the COBISS3/Loan software module, the library must:

- add or edit the home library data; the data is transferred from the COLIB database upon installation of COBISS3 software and is saved to the home library database and the partner database. The entry of Home library data is described in the *COBISS3/Application Administration* User Manual (see chapter *2.1*).

- set up time parameters for loan

- if necessary, add non-work days to the calendar

- if necessary, edit the settings for loan type for copies with restricted availability in the pq table (settings are edited by the national COBISS centre upon the library's written request)

- if necessary, specify the price list

- if necessary, edit overdue notice forms

Most loan-related procedures (registering a new member, outside loan, reading room loan, return of material, etc.) are performed in the **Member** class. You can also find or return borrowed material (except for material borrowed through interlibrary loan) within the **Unavailable material** class. Some loan parameters, e.g. time parameters, are set up in the **Home library** class. Instructions for working with classes common with other software modules (e.g. **Partner**, **Material**, **Field 996/997**, **Home library**) are described in the respective user manuals. The **Material** class can give you insight in the status of the material on loan including the information about who borrowed the material. It is also possible to enter a note on the individual item for the **Field 996/997** object. Price lists can be managed in the **Price list** class, while searching for invoices, entered members' debts and cash register transactions can be performed in the respective classes in the **Entering and settling debts** folder. Cash register can be closed in the **Cash register balance** class.