

3.1 REGISTERING A NEW MEMBER

The procedure of registering a new library member, which is described below, consists of the following steps:

- defining a membership card number
- entering data on the member (member attributes), which is divided to the following tabs: **General, Schooling, employment, Membership and Info**

A library can set up a parameter for transferring member details from the reference students database.

- assigning a password (if necessary) to access the online services of COBISS/OPAC
- printing the label for the membership card
- entering debt for membership fee or admission fee (if applied), i.e. entering membership validity (if checked)

Libraries with departments usually keep records on members separately by departments. The first two digits of the membership card number represent the department, but the members are entered to the shared database of members and they can borrow material in all library departments using the same membership card.



Example:

If the membership card number is *0100203*, the member is registered to department 01 under current number 203.



Tip:

Upon the request of a library with departments, it is possible to set up a special parameter so that department ID is not included in the membership card number.

3.1.1 Defining a membership card number

Procedure

1. Select the **Member** class. Next, select the **Class / New object** method.
2. The **Membership card number** window will open where you can define a member's identification number. For reference, the highest assigned membership card number will be displayed in the window. By selecting the assignment method, you can specify whether you wish to enter the number manually or you wish for the number to be defined automatically.
3. To confirm the entry, click the **OK** button.

Depending on the most frequent type of defining a membership card number in a library, the corresponding type of defining a membership card number (e.g. **Search up**) will already be selected (default value).

If a library sets up a special parameter for transferring member details from the reference students database, the **Membership card number** window will be updated (see chapter 3.1.2.5).

3.1.1.1 Entering membership card number manually

Select the **Manual entry** radio button and type in or enter the desired number by using the reader under "Membership card number".

Use this option if the membership card has been previously prepared for the member (with bar code label) or if you wish to keep the previously allocated membership card number from your "old" records for the member.

3.1.1.2 Entering membership card number automatically

Select the **Search up** or **Search down** radio button, and, if necessary, change the search parameter under "Search from". The current value under "Search from" is by one larger than the last automatically allocated number. Manually assigned numbers do not affect the automatic assignment of numbers. The software will search for the first available number either up or down from the set limit.



Tip:

If you do not save the data on the library member under the selected number, that number will not be taken into account the next time you define a membership card number. The counter is initialised automatically.

You can see available numbers by selecting the **Member** class and then the **Show available numbers** method.



Note:

*If a counter error occurs under "Search from", you can reset the counter by finding and selecting the counter in the **Counters** class, and then use the **Object / Edit** method. To use this method, the privilege LOAN_OPER – Setting lowest counter value is required (see chapter 5).*

3.1.2 Entering data on the member

Once the membership card number is defined, the **Member** editor will open. Use it to enter and edit data on the library member. The data on the member is divided into four tabs:

- **General**
- **Schooling, employment**
- **Membership**
- **Info**



Tip:

When entering data, you can move between fields by using the <Tab> key. To open drop-down lists you can use the <down> key, coded data can be entered without opening the code list, if you know the codes, etc.

3.1.2.1 Entering general data

To enter general data, use the **Member/General** editor.

Procedure

1. Under "First name" and "Surname", enter the name and surname of the library member. The first letters must be capitalised. The entry of this data is mandatory.



Tip:

To enter diacritic characters, press the <Ctrl> + <S> keys and select the desired character in the **COBISS character set** window (the procedure is described in the *COBISS3 Basic Guidelines User Manual*, chapter 6.1.2).

2. Under "Date of birth", enter the date of birth. The data is mandatory due to checking for possible duplicates.

If the database already contains a library member with the same surname, name and date of birth, a new window will open containing a warning message and data on the member(s) with identical details.

Upon the library's request, it is possible to make this data non-mandatory by setting up a special parameter. In this case, only the name and surname of the library member will be used to check for duplicates.

3. Select the gender of the library member from the drop-down list.
4. Under "Citizenship" enter the citizenship designation or find it and copy it from the code list.
5. Under "Guardian/guarantor", enter the name and surname of the parent or guardian of preschool, primary-school or secondary-school children or a guarantor for a foreign citizen.

Upon the library's request, it is possible to make this data mandatory for preschool and primary-school children, as well as for the member category *013 – foreign nationals* by setting up a special parameter.

6. Under "Municipality of perm. add.", enter the code for the municipality of the permanent residence of the library member. If you do not know the code, you can find it and transfer it from the code list.
7. In the drop-down list, select the member category. The data is mandatory.



Note:

For preschool, primary-school and secondary-school pupils, the category you selected will be checked according to their age. A warning message will appear, if:

- a preschool pupil is older than 7*
- a primary-school pupil is older than 15*
- a secondary-school pupil is older than 19*

8. By clicking the **Superior member** button, you can define the relationship to the superior member (for library members of the category *019 – family card*) or partners (for library members of the category *125 – legal entities – external institutions*) (see chapter 3.1.3).
9. By clicking the **Note** button, a new window will open which you can use to enter a note on the member. Several notes can be entered and the software will automatically record the date of entry, username of the librarian who entered the note and, in libraries with departments, the department where the librarian was logged in.
10. By clicking the **Privileges** button, a new window will open where you can highlight the member's privileges.

A member's privileges are:

- Access to OCLC database

If this privilege is granted, the member can access OCLC database via COBISS/OPAC. The privilege can be granted only by the authorised person in the library who signed the membership agreement and has the privilege *LOAN_OCLC – Granting privilege to access OCLC databases*.

- No membership fee

If the privilege is granted to the member, membership fee will not be charged when registering a new member or when their membership expires. Since charging a membership fee is related to a member category, it is recommended to grant the privilege only to individual member categories for which the membership fee is normally charged.

- No loan fee

If a member has this privilege, a loan fee that is normally charged to other members for that type of material will not be charged when you put material on loan or renew the loan period for that member.

- No overdue notices

If this privilege is granted, the member will not receive an overdue notice for the expired loan period, and no costs will be charged for overdue notices.

- No fine

If a member has this privilege, the fine will not be charged when returning material or renewing loan period.

- No reservation fee

If a member has this privilege, a reservation fee will not be charged when allocating reserved material.



Note:

To edit these privileges, the privilege LOAN_PRV1 – Granting privileges to members is required. If you do not have the LOAN_PRV1 privilege, you can only see the granted privileges, but you cannot change them.

11. By clicking the **Restrictions** button, a new window will open where you can highlight the member's restrictions.

The following restrictions can be applied to a member:

- Entry denied

If this restriction applies to the member, no other procedure except returning material can be performed in the **Home library material** window. Before the **Home library material** window opens, a warning message will be displayed. The member cannot renew loan period or reserve the material via COBISS/OPAC due to this restriction.

- Internet access only

If the restriction applies to the member, no other procedure except returning material and entering internet access can be performed in the **Home library material** window (the COBISS3/Loan module does not support this feature yet). Before the **Home library material** window opens for the member with this restriction, a warning message will be displayed. The member cannot renew loan period or reserve material via COBISS/OPAC due to this restriction.

- Outside loan not allowed

If this restriction applies to the member, you cannot put the material on outside loan (the **Outside loan** radio button is not active in the **Home library material** window), but you can put it on reading room loan. The member cannot renew loan period or reserve the material via COBISS/OPAC due to this restriction. Before the **Home library material** window opens for the member with this restriction, a warning is displayed.

- Renewal denied

If this restriction applies to the member, it is not possible to renew the loan period for the material on loan (the **Renew** button is not active in the **Home library material** window). However, you can change the expiry date by double clicking the expiry date and entering a new one. The member cannot renew loan period or reserve the material via COBISS/OPAC due to this restriction.

- COBISS/OPAC reservation denied

If this restriction applies to the member, he/she cannot reserve the material via COBISS/OPAC, however he/she can reserve the material in the library.

- Membership card retained

This restriction is set up automatically in case of self-check-out abuse, but it can be set up manually as well. If this restriction applies to the member, no procedure can be performed in the **Home library material** window, except returning material. Before the **Home library material** window opens, a warning message will be displayed. The member cannot renew loan period or reserve the material via COBISS/OPAC due to this restriction.

- Membership card lost

Set up this restriction if a member lost his/her membership card and uses a duplicate with the same number. Before the **Home library material** window opens, a warning message will be displayed. That way you can check the card and prevent possible abuse if the original membership card was stolen.

- Membership card found

Set up this restriction if the membership card that a member lost or forgot somewhere has been found. If the restriction *membership card lost* was set up before that, cancel it. It is recommended to enter the location of the membership card to the note about the member if the library has several separate departments. Before the **Home library material** window opens, a warning message will be displayed. Once the membership card is returned to the member, cancel the restriction.

- No access to information resources

If the restriction applies to the member, it is not possible to access external providers of information resources. These settings refer to the libraries that signed the statement to access foreign services and have remote access available.

- ILL requests via COBISS/OPAC not allowed

If the restriction applies to the members, he/she cannot submit interlibrary loan request via COBISS/OPAC.

- Self-checkout not allowed

If the restriction applies to the member, he/she cannot use the self-checkout service; however the member can use the services at the lending desk in the library.

- No access to databases of members

If the restriction applies to the member, the member does not allow access to his/her data in the other databases (this currently applies to the Ljubljana City Library, which uses the reference database Urbana).



Note:

To edit these restrictions, the privilege LOAN_PRV2 – Imposing restrictions on members is required. If you do not have the LOAN_PRV2 privilege, you can only see the restrictions, but you cannot change them.

12. Under "No. of copies on loan restr. (LOAN)" enter the maximum number of copies that the member can have on loan.
13. Under "Renewal limit (LOAN)" enter the number of renewals allowed to the member after the loan period expires
14. Under "No. of reservation restr. (LOAN)" enter the maximum number of reservations for the member. In libraries with departments all reservations in different departments are taken into account.
15. Under "Language of overdue notices", select one out of five different language versions, based on which an overdue notice will be created for the member. If the data is not changed for the member, the member will receive an overdue notice in his/her domestic language, which is a default value for this attribute.
16. Under "Outstanding debts", "Current overdue notices", "Lost material (LOAN)" and "Date of last visit" the data is entered automatically. You can only change the data under "Lost material (LOAN)". By doing so, you also delete the note indicator LST.
17. Under "Date of last visit" the date of the last visit is displayed regardless of whether the visit was recorded in the library or outside the library (e.g. in COBISS/OPAC) and regardless of the department in which it was recorded.

3.1.2.1.1 Entering addresses

You can enter data on addresses by clicking the **Addresses** tab and then using the **New object** method. A new window will open where you can choose the postal address, e-mail address and telephone number. Depending on the selection, a window will open where you can enter the data from the address.

You can specify the following:

Procedure

1. By clicking the **Use** button, a window will open where you can specify what the address will be used for; you can select several uses for the same address. The value for the attribute "Use" is not mandatory.



Note:

The use can only be specified for postal addresses. The use of e-mail addresses and mobile phone numbers is specified in the settings for electronic notification.



Note:

*If the guardian/guarantor's address is entered for addressing overdue notices and the library member already turned 18, a message is displayed when you switch to the **Member** editor and when saving data on the member.*

When the member turns 18, regardless of the settings, the overdue notices will be addressed to the name and surname of the member and no longer the guardian/guarantor. This does not apply to members in the category 013 – foreign nationals.

2. From the drop-down list, select the type of address or telephone number.
3. Under "Street and No.", enter the data on the street and street number. The data is mandatory.
4. Under "Postcode and city", enter the postcode or find and transfer it from the code list. In the case of foreign nationals, type in the postcode and city. The data is mandatory.
5. Under "Country", enter the country code or find it and transfer it from the code list.
6. Under "Telephone number", enter the telephone number.
7. Under "Phone number type", select the type of telephone number from the drop-down list.
8. Under "E-mail", enter the e-mail address.



Note:

Entering the permanent postal address of the member is mandatory. Upon the library's request, it is also possible to make this data non-mandatory.



Note:

*The addresses for e-notification (e-mail address and mobile phone number) are entered in the **E-notification** window, which you can open by clicking the **E-notification** button.*



Tip:

If you wish to print a label with a member's address on it, find the member in the **Member** class and select the **Object / Print label with member's address on it** method (see also COBISS3/Interlibrary Loan User Manual; chapter 5.3.2).

3.1.2.1.2 Entering addresses for e-notification

Enter addresses and settings for electronic notification in a special window that will open after you click the **E-notification** button. You can enter e-mail address and mobile phone number and define which types of notifications the library member will receive by e-mail or SMS. Settings for individual notification types depend on the types of notifications available in your library (see chapter 2.4).



Note:

As a rule, addresses and settings for e-notification can be set up by the library members in My library via COBISS/OPAC online.



Note:

As members can set the settings for push notifications through their mobile version of COBISS/OPAC, the settings in the Push notification column cannot be changed.



Note:

When entering data for e-notification, a library member should be warned that he/she will receive SMS notifications only if the service of sending commercial text messages is provided by their mobile provider and if the service was not cancelled by the member.

Options

You can check for a member if it is possible to send SMS notifications to the number for SMS notifications, entered under "Mobile phone number". Sometimes members who used to have SMS notifications blocked are convinced that the receipt of SMS notifications is no longer blocked, but they still do not receive SMS notifications. By clicking **SMS test** in the **E-notification** window, a test message is sent to the number for SMS notifications. If the member confirms that he/she received the message, it means that messages are no longer blocked and he/she should be receiving SMS notifications. If the member does not receive the test SMS notification, it means that commercial messages are still blocked, so he/she should contact the mobile provider to unblock messages.

The test SMS notification is sent free of charge.

3.1.2.1.3 Entering alternative or invalid identification numbers

To enter an alternative identification number, click the **Alternative ident. numbers** tab, and then click the **New object** button. A new window will open, where you can enter the following:

- Under "Alternative number type", select the alternative number type from the drop-down list. The data is mandatory.

- Under "Alternative number", type in the alternative membership number, or enter it by using a reader, which library members can use for identification when visiting a library. When entering alternative numbers, the program will automatically check for duplicates (whether another member has the same value for the same type of alternative number); several identical values of different types of alternative numbers and several alternative numbers of the same type can be entered for one member.

Invalid numbers are entered automatically when you use the **Member / Change of membership card number** method, when a library member loses his/her membership card. To view these numbers in the member details editor, click the **Invalid numbers** tab, select the invalid number in the window, and click the **Show** button.



Tip:

The membership card number of a deleted member or a deleted alternative number, which was saved to invalid numbers, can become available by finding the invalid number and deleting it by using the **Delete invalid number** object method.

3.1.2.1.4 Entering the COBISS/OPAC password

Enter the authorisation password in online COBISS/OPAC in a special window that will open once you click the **Password** button. A series of asterisks will appear while entering the password. If the member forgets the password, a new one must be defined.

3.1.2.2 Entering data on schooling and employment

By clicking the **Schooling, employment** tab, you will open a window where you can enter the data on schooling or employment of the library member, if required.

Procedure

1. Select the type of school from the drop-down list.

At library's special request a default type of school can be defined with a special parameter.



Note:

*If your library falls within eVŠ (Evidential and analytic information system for higher education in the Republic of Slovenia), the entry of data on schooling in the eVŠ system is enabled by turning on a special parameter in the **Schooling, employment** tab (see chapter 3.1.2.2.1).*

2. Under "University" enter the university code or find and transfer it from code list of universities.

3. Under "Name of school", type in the school code or select it from the code list. Depending on the type of school you selected, you can search the code list of primary and secondary-schools or in the code list of universities.
At library's request of the library, a default school name can be defined with a special parameter.
4. Under "Class/grade", enter the class or find it in the code list, which opens depending on the selected type of school, and transfer it.
5. Under "Course of study", enter the course of study or the training programme or find it in the code list and transfer it. You have to create the code list of courses of study yourself (local code list *Study programme (CODE 313)*), while the code list of universities is common to all the libraries.
6. Under "Level of study", enter the level of study or find and transfer it from the code list.
7. Under "Company of employment", enter the name of the institution in which the library member is employed, or find it and transfer it from the code list you created (local code list *Institutions, companies (CODE 303)*).



Note:

If you entered the member's business address, it is recommended to enter the data on employment as well.

8. Under "Department of employment", enter the department in which the library member is employed, or find it and transfer it from the code list you created (local code list *Department of employment (CODE 306)*).

3.1.2.2.1 Entering data on schooling in the eVŠ system

Libraries of the universities in the eVŠ system (Evidential and analytic information system for higher education in the Republic of Slovenia) can enter the eVŠ data by a special parameter in the configuration file. In these libraries, in the **Member** editor, you can specify data on the university, study programme, study programme B and mode of study by selecting appropriate values from the drop-down lists. The study programme drop-down lists will open according to the selected university. If you change the university, the selected values under both study programmes will be deleted.

3.1.2.3 Entering membership data

By clicking the **Membership** tab, a window will open containing the data related to the library membership. Most of the data will be entered automatically.

Automatic control of membership validity is activated upon the library's request with a special parameter. In this case, a warning message will be displayed when registering a new member or if a member whose membership

expired visits the library; at the same time it is possible to record membership validity automatically. If you charge membership fee in the library, you must enter the price for membership fee and admission fee (see chapter 7.1 and 7.2.2.1).

Procedure

1. Under "Library code", the library code is entered automatically depending on the parent library. The data cannot be changed.
2. Under "Department", the department is entered automatically depending on the department in which you are signed in; the data is only entered for those libraries, which have loan facilities available in several departments. The data cannot be changed.
3. Under "Mobile library stop", the mobile library stop where you are logged in when entering loan procedures in the mobile library will be automatically entered. The data can be changed manually.
4. Under "Membership start date", the current date is entered automatically. You can change the data, if the date entered is not the membership start date.
5. Under "Membership renewal date", leave the field blank. If you keep records on membership validity in the library or if you charge membership or admission fee, the current date will be entered when registering membership validity automatically or when entering debt for membership or admission fee. If it is a library member you wish to transfer from old library member records, you can enter the last membership renewal date manually.
6. Under "Membership expiry date", leave the field blank. If you keep records on membership validity in the library or if you charge membership or admission fee, the new membership expiry date will be entered when registering membership validity automatically or when entering debt for membership or admission fee. This date is calculated on the basis of membership validity period for member category or generally valid membership expiry date will be taken depending on the settings in the **Restrictions on operations** class. If the membership validity is not explicitly specified, the default period is 1 year. Automatically calculated membership expiry date can be changed according to your needs by entering a new one manually. If it is a library member you wish to transfer from old library member records, you can enter the membership expiry date manually.
7. Under "Membership validity", enter the code for the membership validity time period or find it and transfer it from the local code list *Type of membership fee – individual (CODE 318)*. The data that you enter will be taken into account when calculating the membership expiry date and entering an individual membership fee for the member.
8. Under "Statement signed", tick the check-box to indicate whether the member signed the membership statement or not. If you use a signature pad, the tick will be placed automatically when the member confirms the signature entry on the signature pad.

**Tip:**

Upon the library's request, it is possible to specify by means of a special parameter that a control is performed on whether the member signed the statement when becoming a library member. If a member did not sign the statement, a notification will be displayed when switching to the **Member** editor and the **Home library** window. To continue with your work, confirm the notification.

3.1.2.4 Data on member conduct

By clicking the **Info** tab, a window will open containing the data related to member conduct. The data is entered automatically and cannot be changed.

- Under "Departments", the codes of the library departments that the library member visits are displayed. The data is only displayed for libraries in which loan is organised in separate departments.
- Under "No. of copies on loan (LOAN)", the number of the member's copies currently on loan will be displayed.
- Under "Date of last overdue notice", the date of the last sent overdue notice will be displayed.
- Under "No. of overdue notices received", the number of overdue notices received by the member up to that day will be displayed.
- Under "Received overdue notices ", the box will be ticked if the member received at least one overdue notice up to that point.
- Under "No. of visits a year (LOAN)", the number of library visits of the member in the current year will be displayed.
- Under "Entered by", the username of the librarian who created the record on the member will be displayed.
- Under "Entered", the date of record creation will be displayed. The date is equal to the date of the first entry, if the library member actually joined the library on the same day as his data was entered to the database.
- Under "Modified by", the username of the librarian, who entered the last change of the member details, will be displayed.
- Under "Modified", the date of the last change of the member details will be displayed.
- Under "Access to info. res.", a list of groups of information resources is displayed to which the member has access to. The settings for the access are defined in accordance with the requirements of the individual library with special parameters in the configuration file. If the member does not have access to information resources, the reason will be displayed (e.g. *Outstanding debts*).
- Under "Departments – details", if the loan is organised in separate departments within the library, the data regarding the member conduct

will be displayed for the separate departments which the member visits (department number, date of last visit, no. of copies on loan, date of last overdue notice, no. of overdue notices received, number of copies lost, no. of visits a year).

3.1.2.5 Transferring member details from the reference students database

Creating a reference students database is described in chapter 3.9.

If a library sets up a special parameter for transferring data from the reference students database when entering a member, the **Membership card number** window will be updated.

Procedure

1. In the **Membership card number** window, set up the identification number assignment method (see chapter 3.1.1).
2. Highlight the "From students database" button.
3. Find the record on the student in the reference database. You can search by the user number, membership card number, name or last name. Your search can be truncated by using an asterisk.
4. The window with a list of records on students will open.
5. Double-click the record on the student to open it.
The **Member** editor will open.
6. Check the member details and update it if necessary.

From the reference students database, the following data will be transferred to the member details: name, surname, user number, student transcript number, university in eVŠ, study programme in eVŠ, study programme in eVŠ – B, year of study, mode of study, permanent address postcode, temporary address postcode, business address, date of birth, membership card number, e-mail address, membership expiry date and a note. Based on the mode of study, member category will be automatically defined.

3.1.3 Defining a superior member

Members who use family cards or membership cards of the institution that employs them, are entered as members of the category *019 – family card* or *125 – legal entities – external institutions*. You will define their superior member in the membership data. The superior member or partner must be entered beforehand.



Tip:

To delete the relationship to a superior member, click the  L261.

3.1.3.1 Family card

Library members using a family card are entered individually. The person whom the card is issued to must be defined as the superior member. For all family members, the member category must be *019 – family card*. For subordinate members, the relationship to the superior member is defined on the **General** tab.

Procedure

1. Once you click the **Superior member** button, the **Search – Member** window will open.

2. Find and select the member you wish to define as superior member.

If the category of the superior member is not *019 – family card*, it will be changed to that category automatically.

If you wish to copy the permanent postal address of the superior member, answer the question in the **Address transfer from superior member details** window affirmatively.

3. Save the member details.

When a library member who is a subordinate member and holds a family card visits the library, the **Member** window will open. Use it to select the desired family member.

3.1.3.2 Legal entity card

Library members, who use the membership card of the institution they work for, are entered as subordinate members of that institution – partner. The data on the institution – partner must be entered beforehand. The procedure of entering partner data is described in the *COBISS/Application Administration User Manual* (see chapter 3.1).

Procedure

1. Once you click the **Superior partner** button, the **Search – Partner** window will open.

2. Find and select the partner.

If you answer the question in the **Address transfer from superior member details** window affirmatively, the partner's address will be transferred to the member's postal addresses. The type of address will be *business address*.

3. Save the member details.

3.1.4 Registration form

The library can decide to sign registration forms with the signature pad and save these documents in electronic form.



Note:

This functionality can only be used with the corresponding technical equipment for the electronic signature of documents. The COBISS3 software supports the Omega signature pad by Signotec. It is not necessary to separately install the signature pad or set it up. The signature pad just needs to be plugged into the USB-port of the workstation.

Procedure

4. When adding a new member or updating the member data in the **Member** editor, click the **Registration form** button that starts the preparation of the registration form.
5. The **Overview and sending of created report** window will open. The created registration form that has not been signed yet can be checked and, if necessary (e.g. upon the member's request), printed.
6. To start the procedure of signing the registration form, right-click to open the menu on the "Registration form" report in the **Overview and sending of created report** window and then select the **Sign document** method.



Note:

*If the signature pad is not plugged into the USB-port of the workstation, a message will appear once you confirm the **Sign document** method.*

7. The **Signature** window will open, where you click the **Start** button. By doing so, you activate the signature pad and hand it to the member to sign within the box. If the member didn't sign it correctly, the screen can be refreshed with the  arrows and sign again. The member can cancel the signing procedure with the red cross .

When the member signs the pad, the signature must be confirmed by clicking the green tick  with the pen. By clicking, the member confirms that the registration form was signed. The signed registration form is thereby signed.

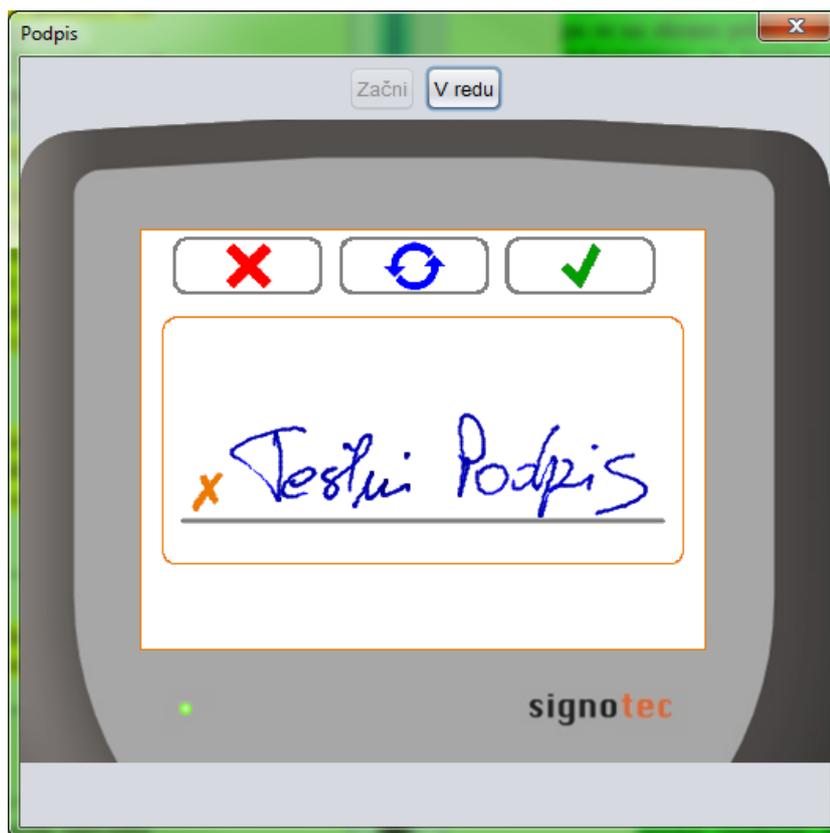


Figure 3.1.4-1: Signature window after the member's signature



Tip:

If the registration form must be signed by two people (e.g. the member and the guarantor in the case of a foreign national or the member and the guardian in the case of an underage person, etc.), two people can sign in the box on the signature pad, but both signatures must be entered before they are confirmed with the green tick, as it is not possible to add an additional signature after the confirmation, when the registration form is saved. However, you can create a new registration form with two signatures.

8. The **Signature** window is refreshed once the signature is confirmed and the signature cannot be changed anymore. Neither can the procedure of creating a registration form be cancelled. The librarian completes the procedure of creating a signed registration form by clicking the **Close** button or the cross for closing windows.



Tip:

The **Start** and **Close** buttons can also be confirmed on the keyboard with the space bar.

The *Registration form* document will open on screen in PDF-format. If necessary, you can check, print, etc. the document. Before you continue with your work, close the document and also the **Printing** window.

On the **Membership** tab under "Statement signed" a tick is added automatically.



Note:

*In order for the data on the member, for whom you are creating the registration form, to be saved, you must click the **OK** button in the **Member** editor after finishing your work with the registration form.*



Note:

It is not possible to delete electronically saved registration forms individually. All saved registration forms are deleted automatically when members are deleted (either individual or batch deletion of inactive members).

Options

You can also create and print a registration form if you find the member in the **Member** class and then select the **Object / Print** method or the **Object / Send** method.

3.1.4.1 Registration form contents and form

The form of the registration form can partially be adapted to the needs of an individual library. For this purpose, new variables were added to the standard definitions were added to the standard definitions for loan in the COBISS3/Reports software module (**Report variables / Standard / Loan** folder) in the **Registration form** folder:

- *Registration form name*, which enables changing the default name REGISTRATION FORM (e.g., you can change it to REGISTRATION STATEMENT etc.)
- *Member statement on the registration form*, which enables preparing the registration form text, adapted to the individual library (e.g. for stating the conditions of membership, use of personal data, etc.); the default value of the standard definition is blank.
- *Note on the registration form*, which enables entering additional remarks at the end of the registration form, i.e. below the member's signature; the default value is blank.

Select, copy and paste the variables, the values of which you wish to change, and paste them to the folder, created for this reason, among the user definitions.

The form and content of the registration forms depends on which data on the member is entered. The data on the registration form is divided into four categories.

Basic data:

- membership card number
- department
- member category
- superior member/partner

Personal data:

- name
- surname
- date of birth
- gender
- citizenship
- guardian/guarantor's name and surname
- municipality of permanent address

Addresses (street and number, postcode and city, country, VAT ID No./Tax No.) and other contact details:

- permanent address
- temporary address
- work address/head office
- guarantor's/guardian's address
- guarantor's/guardian's address and permanent address
- guarantor's/guardian's temporary address
- address abroad
- phone
- mobile phone
- e-mail address
- VAT ID No./Tax No.

Other data (schooling, employment):

- university
- school/faculty name
- course of study
- university in eVŠ
- study programme in eVŠ
- study programme in eVŠ – B
- level of education
- employment
- department of employment



Tip:

The library can decide to include their logo on the registration form. The logo will be displayed in the registration form header. To include the logo on registration forms, the library must send the logo, defined as an image, saved in jpg or gif format, maximum size 25 x 176 mm.

If the library decides to include their logo on the registration forms, the logo will also be displayed on overdue notices in A4 format (see chapter 8.5.1).

3.1.4.2 Accessing electronically saved registration forms

You can view and print the saved registration forms.

Procedure

1. Find and select the member in the **Member** class.
2. Select the **Object / Archive of e-documents** method.

The **Overview of e-documents** window will open with the list of saved registration forms. The following data is displayed for each registration form: "<document name>; entered: dd.mm.yyyy; entered by: <username>". If there are several registration forms saved for one user, the data for each registration form will be displayed in a separate row. The most recent registration form is at the top of the list.

3. Select one or more delivery notes. Next, click the **OK** button to display the selected registration forms in PDF format. If you selected several registration forms, every registration form is displayed in a separate document. You can view or print the registration form.
4. If you wish to cancel the process of reviewing e-documents, click the **Cancel** button.