4.16   KEEPING RECORDS ON LOAN OF SETS

Libraries can make up a set if they wish that all set items are put on loan, returned, renewed or reserved at the same time and under the same conditions. The so called **leading item**, which defines common set properties, must be defined for the set:

- type of material is defined by the bibliographic record for the leading item or a physical form of the leading item, entered in element \o of subfield 996g

- when you lend a set, loan conditions of the leading item (time parameters, 996p, 996q, 996u and settings in table pq) are taken into account

- when entering debts, the debt for the complete set is charged only once under the conditions that apply to the leading item of the set

- overdue notice costs are charged only for the leading item; overdue notice is entered for each individual set item

- all set items are displayed on lending forms in a way that shows which set items are part of an individual set

When you **lend a set**, all set items must be put on loan together. When you read the accession number or the loan number of any item of the set, a window will open with a list of all items and then each item can be read separately. The same due date will be entered for all set items, and the loan period of the leading item of the set will be taken into account. If a loan fee or tear and wear fee is defined in the price list for this type of the leading item, enter it only once for the complete set and under the conditions that apply to the leading item.

When you **return a set**, as a rule, all set items must be returned at the same time. When you read one of the set items, a list of all items will open and you have to read each item separately. After you confirm it, all set items are deleted from the records. If you charge a fine when returning a set, you charge it only once under the conditions that apply to the leading item. It is also possible to return an incomplete set if a member lost an item or forgot it at home or returned a damaged or incomplete set. Use the procedure when you wish to enter the loss of material and keep it in the member's records at the same time until the payment method is agreed with the member.

When you **renew the loan** and you set a new return date, loan renewal period for the leading item is taken into account so that the same due date is entered for all set items. If the loan renewal for the leading item of the set is restricted, no item of the set can be renewed.

When you **reserve a set**, reservation validity period for the leading item is taken into account. Reservations of unavailable material are entered with an accession number of the leading item in the following form: *<COBISS.XX-ID, accession number of the leading item>*. You can enter the reservation of available set for the member by entering all set items with status *O*. You can

also reserve a set through the catalogue. You can select any set item in the hit list and by doing that reserve the complete set. When you delete the reservation, reservation for all set items is also deleted.

In **statistics**, transactions of individual set items are taken into account (if, for example, a set with five items is put on loan, the loan statistics will show the loan of five items).

4.16.1   Loan of a set

A set can be put on loan only in the **Home library material** window. It cannot be put on loan through the catalogue.

Procedure

1. Highlight the **Member** class and select the **Class / Home library material** method.

   The **Search by key** window will open.

2. Select the member.

   Find the member by their membership card number or by some other data (see chapter *4.1*).

   The **Home library material** window will open. The active **Lend** method is set as default and the **Outside loan** button is selected. If you wish to put a set on reading room loan, select the **Reading room** button.

3. Under "AN/LN=", enter or use a reader to enter the identification number of any set item.

   The **Set** window with a list of all items of the set will open. On the list, the accession number of the read item is displayed in green.

4. Read the other set items.

   When you confirm the last read item of the set, all set items will be entered with the status *C* or *S* and with the same loan period expiry date. The due date will be calculated according to the loan period of the leading item of the set.

Note:

When controlling the number of items on loan, the set is considered as one item, irrespective of the number of items in the set.

On the lending form, the set items are displayed so that the leading item is displayed first, followed by other items displayed indented. For each item of the set, the set number, the set item number, the number of all set items and the volume designation (element \x from subfield 996d) will be displayed.

If a set is made up of material from different bibliographic records, the general data on each set item will be displayed on the lending form. The leading item will not be displayed indented.

4.16.2   Return of a set

You can return a set or delete a reservation of the set in the following ways:

- in the **Home library material** window by entering identification number of any set item (accession number or loan number)

- in the **Home library material** window by selecting any set item from the list; this way you can also delete a reservation of unavailable set (material status is *R*), where identification number of the reservation is *<COBISS.XX-ID, accession number of the leading item of the set>*

- without selecting a member, by entering identification number of any set item (the **Unavailable material / Return, delete** method)

Procedure

1. In the **Home library material** window, read the identification number of the copy or select any set item from the list.

   If you return a set without selecting a member, read the identification number of any set item in the **Search by key** window.

2. Click **Return**.

> Tip:
>
> If you return a set without selecting a member, the **Return** button is already active in the **Home library material** window so you can press the <Return> key to confirm the return of material.
>
> If you return the material in the **Home library material** window, the return can be performed also by pressing <Alt> + <V>.

   The **Set** window with a list of all set items will open. The selected default value in the drop-down list is *returned*. On the list, the accession number of the read item is displayed in green. If you selected an item for return from the list, no item is selected in the window, so you must read the identification number of the selected item.

3. Read each individual set item.

   When you confirm the last read set item, all set items are written off for the member.

If the loan period has expired and a fine is set in the price list for this type of a leading item, the fine is charged once for the complete set and is entered only for the leading item.

If a set is reserved, a notification will appear automatically when returning the set. The set will be allocated to the first member on the waiting list. A notification about received reserved set will be sent (if a member is subscribed to e-notifications for this) only once for all set items at the same time. Also, a slip with data on the received set (if a library prints slips with data on the received material) will be displayed only once. The slip contains short data on the leading item of the set, and for other items, data on accession number,

designation and set item are displayed. All items that a member is waiting for will get the status *W*.

If a library charges costs for notifications about availability of reserved material, the costs are calculated only once for the leading item of the set.

4.16.2.1 Return of an incomplete set

It might happen that a member returns an incomplete or a damaged set (e.g. a member might forget one item of the material at home, return an incomplete set or a set where one or more items are lost). In the following pages, procedures for the return of incomplete or damaged sets are described.

4.16.2.1.1 A member forgets a set item at home

If a member returns only a few set items but not all, highlight the item that was not returned and select *forgotten* from the drop-down menu. The read set items for which a return with restriction is entered will acquire the status *B – retained*, and set items that are not returned will acquire the status *C – outside loan*.

When a member returns the missing set items, enter the return of all set items in the **Set** window.

4.16.2.1.2 A member returns a damaged set

If a member returns a damaged set, enter the return of all set items (see chapter *4.16.2*), and mark the damaged set items with the status *6 – damaged*.

Procedure

1. In the **Home library material** window, read the identification number of the copy or select any set item from the list.

2. Click **Return**.

> Tip:
>
> If you enter the return of material in the **Home library material** window, you can perform the return also by pressing the key combination <Alt> + <V>.

The new **Set** window with a list of all set items entered for the member will open.

3. Highlight the damaged item on the list and then select the value *status 6 – damaged* from the drop-down list.

The accession number of the damaged item is displayed in grey. For the damaged set item, the value *6 – damaged* will be automatically entered into subfield 996q, and for the leading item of the set, the loan restriction *0d*

(subfield 996u) will be automatically entered. This will disable further loan of the set or allocating the set to the member who reserved it.

4. Read the undamaged items and do not change the default value *returned* in the drop-down list.

    When you read the last set item, set items are no longer recorded for the member.

If a reservation for the set exists, a notification and a slip with data on the reserved set will be displayed, and the reservation will be deleted at the same time. The slip will contain a note that the set must be checked as the loan for this set is restricted.

What to do next   After you enter the damaged set, you can decide whether you wish to de-accession the complete set, remove the damaged item from the set or delete the status of the damaged item and delete *0d* in subfield 996u for the leading item. If the set was reserved, you have two options:

- if you decide to de-accession the set and this is the only set available for loan, you must notify members who already reserved the set about this;

- if the set is not de-accessioned and is available for loan, enter the reservation of the available set. Then prepare the set and notify the member.

4.16.2.1.3 A member returns a set with one or more items lost

If a member does not return all items of the set, enter the return of returned set items; for lost items, enter the loss.

Procedure   1. In the **Home library material** window, read the item identification number or select any set item from the list.

2. Click **Return**.

> Tip:
>
> If you enter the return of material in the **Home library material** window, you can perform the return also by pressing <Alt> + <V>.

The new **Set** window with a list of all set items entered for the member will open.

3. Highlight the lost item on the list and select *lost (loan status L)* from the drop-down list.

    The accession number of the lost set item will be displayed in red.

4. Read the returned items and do not change the default value *returned* from the drop-down list.

    When you read the last set item, return with restriction will be entered for the returned items of the set and the items will acquire the status *B* –

retained, and the items of the set that were not returned will acquire the status *L – lost*.

If a member *returns* the items of the set at a later time, enter the return of all set items by using the **Return** method. In the **Set** window, read all set items, including those items that were entered with the status *B – retained*.

If a set is reserved, it will be allocated to the first member on the waiting list. If a member is subscribed to e-notifications about received reserved material, the member will receive the notification, and a slip with data on the received reserved set will be displayed.

If a member ***does not return*** the lost item of the set, highlight the lost item in the **Set** window and select the status *8 – lost (holdings)* form the drop-down list; for returned items, perform the relevant procedure so that they are no longer recorded for the member. When you do this, the value *8 – lost (holdings)* will be automatically entered for the lost items into subfield 996q in the holdings data; for the leading item, loan restriction *0d* (subfield 996u) will be entered, which automatically disables the loan of the set.

If the lost set is reserved, the set will not be allocated to the member, who is the first on the list of reservations, because the value *0d* is entered for the leading item. A notification about the existing reservation and a slip with data on the reservation will be displayed, and the reservation will be deleted at the same time. The slip will contain notification that the set must be checked as the loan for the set is restricted.

When you enter the set with lost items, you can decide whether you wish to remove the item from the set and delete the value *0d* in subfield 996u and thus enable the loan, or you can de-accession the complete set.

For the reserved set, there are two options:

- if you decide to de-accession the set and this is the only set available for loan, you have to inform the members who reserved the set about it;

- if the set is not de-accessioned and is available for loan, enter the reservation of the available set, prepare the set for loan and inform the member that the material is waiting.

4.16.2.2   Returning the set with restriction

If you wish to check the material (e.g. toys) when they are returned and before they are put for loan again, enter return with restriction, which means that the material will still be entered for the member (status *B*). Only after the material is checked, it is no longer recorded for the member.

Procedure

1. In the **Home library material** window, read the item identification number or select any set item from the list.

2. Click **Retain**.

> Tip:
>
> If you enter the return of material in the **Home library material** window, you can perform the return also by pressing <Alt> + <A>.

The new **Set** window with a list of all items of the set entered for the member will open. In the drop-down list, the selected default value is r*eturned*. On the list, the accession number of the read item is displayed in green. If you select an item for return with restriction from the list, no item will be highlighted in the window so the identification number of the selected item must also be read.

3. Read each individual item of the set.

    When you confirm the read item of the set, the status *C* will change into status *B* for all set items. In this way, further loan for the set will be disabled or the set will not be allocated to the member who reserved it.

    When calculating the loan period expiry date, the time parameter *res* (status *R*) is taken into account for the leading item of the set. The date of entering the return with restriction is entered under "Date of return".

When creating overdue notices, overdue notices for the material with status *B* will not be prepared even if the date has already expired.

What to do next   When you finish checking all items of the set, you can return it by using the **Return** method. Because this is a set, all items must be read in the window with a list of set items (see chapter *4.16.2*).

4.16.2.3 Entering the loss of a set

If a member reports the loss of all set items and you would like to enter the loss but you do not want to delete the material from the member's records, enter the loss of the complete set.

Procedure   1. In the **Home library material** window, read the item's identification number or select any set item from the list.

2. Click **Return**.

> Tip:
>
> If you enter the return of material in the **Home library material** window, you can perform the return also by pressing <Alt> + <V>.

The new **Set** window with a list of all items of the set entered for the member will open.

3. Highlight all items of the set.

    To highlight all items of the set, press <Ctrl> + <A>.

4. Select the value *lost* (loan status *L*) from the drop-down list.

For all set items, the status *C* will change to status *L*, with the same status *L* expiry date; the time parameter *res* will be taken into account for the leading item of the set.

The date of entering the loss will be displayed in the 1st row of the 6th column.

When entering the lost set, the number of lost items under data on member conduct "Lost material (LOAN)" will automatically increase by the number of items in the set; in the **Home library material** window, the note indicator *LST* will be displayed in the right upper corner of the screen.

By entering the loss of the set, further loan of the set will be disabled and the set will not be allocated to the member who reserved it.

A member can also receive an overdue notice for the entered lost item when the status *L* expires.

If a member did not lose all items of the set, do the procedure as described in chapter *4.16.2.1.3*.

What to do next   If a member *finds* the material at a later time, return all items of the set by using the **Return** method. Read all items of the set in the **Set** window.

If a member *does not find* the material and informs the library about it, perform the relevant procedure so that items of the set are no longer recorded for the member by selecting any item of the set with status *L* and clicking **Return**. Then select all items of the set in the *Set* window and select the value *status 8 – lost (holdings)* from the drop-down list. All lost items in the holdings data will acquire the status *8 – lost*, and loan restriction *0d* will be set for the leading item of the set, which automatically disables the loan.

4.16.3   Loan renewal

Loan renewal for sets is possible only in the **Home library material** window.

Procedure   1. In the **Home library material** window, highlight any set item for which you wish to renew the loan period.

2. Click the **Renew** button.

   When renewing the loan period, the renewal period for the leading item of the set will be taken into account and the loan period will be renewed for all items of the set. Renewal restrictions are checked only for the leading item of the set (renewal period, restrictions in subfields 996u, 996p, 996q, restricted number of renewals for member).

4.16.4   Change of status expiry date

You can change the expiry date of the set status only in the **Home library material** window.

1. In the **Home library material** window, double click to set the expiry date (7th column Due/ovrd).

2. Enter the new expiry date (copy the old date) and confirm by pressing the <Return> button.

   The expiry date will be changed for all items of the set.

4.16.5   Sets in the catalogue

In the catalogue, items that are part of the set and from the same bibliographic record are displayed together for each set separately. For each set, the set number and the set item number are also displayed. Items are sorted by the set number.

If set items are from different bibliographic records, they are not displayed together in the catalogue, only the set item that you found in the catalogue is displayed. For each item, the set number and the set item number are displayed. Thus, a set can be reserved based on any selected item.

> Note:
>
> *You cannot put a set from the catalogue on loan because the set must be complete.*

4.16.6   Reserving sets

Reservation of a set can be entered for the selected member in the catalogue (see also chapter *4.13*). When reserving a set, reservation validity period for the leading item is taken into account. Also, any reservation restrictions are checked only for the leading item. When checking restrictions for reserved items, a set is considered as one item, regardless of the number of items in the set.

4.16.6.1 Reserving available sets

If you select any item of the set that has the status *available*, all set items are entered as reserved with status *0 – available item reserved* for the member. When defining the reservation validity period, the time parameter *ord.* (reservation validity period for available material) is taken into account for the leading item of the set.

You can delete the reservation of available material if you read identification numbers of all set items. You can use the **Return** method in the **Home library material** window or the **Unavailable material / Return, delete** method (without selecting a member). Then read each item in the new window with a list of set items.

4.16.6.2 Reserving unavailable sets

Reservation of an unavailable set is associated with the accession number of the leading item. Reservation of the set is entered for the member with the entry of the leading item in the following form <COBISS.SI-ID, accession number of the leading item>. When defining the reservation validity period, the time parameter *res.* (reservation validity period) is taken into account for the leading item of the set.

Reservation of an unavailable set can be entered if you select an item for reservation from the set. If you select a bibliographic description for reservation within which at least one item has a set designation in subfield 996c, a notification will be displayed informing you that the reservation is not possible.

Reservation of an unavailable set can be deleted if you select the reserved set in the **Home library material** window and click the **Return** button.

4.16.6.3 Reserving a set for reading room use

Reservation of a set for reading room use is entered in the catalogue by selecting any item of the set (see also chapter *4.13.5*). A new window where a list of all set items is displayed will open. Each item of the set must be read. All set items with the same reading room reservation validity period are entered for the member, the time parameter *read.* (reading room reservation validity period) for the leading item is taken into account.

You can delete the reservation of the set for reading room use if you read the accession numbers of all items of the set. You can use the **Return** method in the **Home library material** window or the **Unavailable material / Return, delete class** method (without selecting a member). You must read each item in the new window with the list of set items.

4.16.6.4 Creating a list of reserved sets

As with other reserved available material, the **Unavailable material** / **Process reservations** method can be used to check if there are any new reservations of available sets (see also chapter *4.13.3*). Reservations are displayed for each set item separately, but under the accession number of an individual set item, accession numbers of all items that belong to the set are displayed.

4.16.6.5 Preparing reserved sets for collection

You can remove reserved sets from the shelves and use the **Unavailable material / Prepare reserved material for collection** method to prepare the sets for collection (see also chapter *4.13.1.1*). Read the accession number of any item of the set. A new window will open where a list of all set items will be displayed. Each set item must be read. All set items will get the status *W*

with the same reservation validity period, and the time parameter *wait*. (time period during which a member may borrow reserved library material) for the leading item is taken into account.

If a member is subscribed to e-notification service, one e-notification will be sent to the member, and a slip with data on the reserved set will be printed. Any costs of notifications about received reserved sets are charged only once.

4.16.6.6 Batch deletion of set reservations whose period of validity has expired

When you batch delete reservations, whose period of validity has expired, reservations of the complete set will also be deleted. In a report that is prepared after you delete expired reservations, the set items for which the reservation was deleted are displayed. It is automatically checked whether the set is reserved for another member. If it is, the set is allocated to the first member in the list of reservations. Notify members who selected an option of e-notification when deleting reservations about the expired reservations or received sets accordingly.

4.16.7 Insight into the library material status

When the **View** method is used for items that are part of the set, the number of the set and the number of the set item from subfield 996c will also be displayed after the accession number of an individual set item in the **Insight into the library material status** window.

4.16.8 Overdue notices

When you create overdue notices by using the **Overdue notices** / **Create overdue notices** method (see also chapter *8.1*), time parameters that are valid for the leading item of the set are taken into account for the set items. An overdue notice is entered for each set item separately.

In libraries that charge overdue notice costs by items, the cost is calculated only for the leading item of the set.

In overdue notice reports, each set item is displayed with the number of the set and designation of the set part.